CHAPTER 6: DATA ENTRY AND ADVANCED EDITING

VII. DEFAULTS AND CARRY OVER FIELDS

VIII. MACROS

IX. ASSOCIATED RECORDS

I. BASIC EDITING

A. Overview

1. *What editing functions are available in **ICMS**?*

There are a number of editing functions available in **ICMS**. These functions allow you to add, modify, copy and delete data and records. The basic editing functions are:

- Add New Record
- Copy This Record
- Modify This Record
- Delete Record(s)

For more advanced editing functions, see the other sections in this chapter.

2. *When should I use these functions?*

Use:

- Add New Record to create new records.
- Copy This Record to save keystrokes when creating records by copying an existing record and changing only certain fields.
- Modify This Record to edit data in the selected existing record.
- Delete Record(s) to remove records.

3. *Do I need special rights to use the editing functions?*

For the basic editing functions listed above, you only need Data Entry security rights with the exception of Delete Multiple Records. For advanced editing functions described in later sections of this chapter you also need Administrator security rights or specific access to the advanced function.

Refer to Section VI of Chapter 9 for information on user security.

4. *Are the editing functions available for all my records?*

Yes. The editing functions are available for all your **ICMS** records, including associated module records.

B. Add New Record

1. *When do I use the Add New Record function?*

Use the Add New Record function when you want to create a single record. This option places you in Add Mode.

2. *How does this function work?*

To add a new record:

- click on the add icon on the button bar, *or*
- go to Edit on the menu bar and choose Add New Record from the pull-down menu, *or*
- press the F9 key

A new window opens. “Add Mode” is indicated in the lower right of the status bar. You can then add and save a record.

In the Collections module, the last acronym that was used for the catalog and accession number will appear on the record. The program returns you to the View mode when you save the record.

Note: Remember to set any defaults you want before adding records. Refer to Section VII of this chapter for information on defaults and carryover.

3. *How do I save the records I add?*

To save a record:

- click Save and Close on the lower right corner of the screen, *or*
- click the Save and Close icon on the button bar, *or*
- go to File on the menu bar and select Save and Close.
- or press F2

To cancel the record without saving the data:

- click on Cancel on the lower right corner of the screen
- click on the Cancel icon on the button bar, *or*
- go to File on the menu bar and select Cancel

You must enter all mandatory data in order to save the records you add. The program will prompt you for any mandatory data that you have not included in the record. You then have the choice of returning to the record to add the data, saving it as a draft record, or aborting the record. Refer to Chapter 2, Cataloging, for information on saving a catalog record as a draft record. The on-line field help and this manual identify the mandatory fields for catalog records and associated modules.

4. *What is the difference between "Save" and "Save and Close"?*

Both "Save" and "Save and Close" will save your work and return you to View Mode on the record. However, "Save" will leave the record window open whereas "Save and Close" will close the record window.

5. *How can I add a number of records in a continuous fashion?*

To save time when adding a number of records, use the Save and Add Another link when saving a record. This option will save the current record and close it, then immediately open a new blank record window in Add mode for you to continue entering the next record.

C. Copy This Record

1. *When do I use the Copy This Record function?*

Use the Copy This Record function to make an exact copy of the record currently displayed on the screen. You can then edit and save the record as a new record. This option places you in Copy Mode.

2. *How does this function work?*

To copy the record currently displayed:

- click on the copy icon on the button bar, *or*

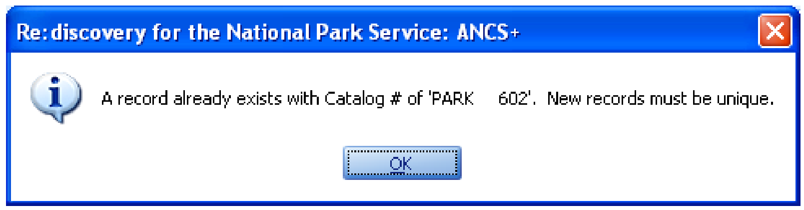
- go to Edit on the menu bar and choose Copy This Record from the pull-down menu.

A new window opens. “Copy Mode” is indicated in the lower right of the status bar.

3. *How do I save the records I copy?*

You must change the catalog number on records you copy before you can save the records.

If you don’t change the catalog number, you cannot save the record. A system message tells you that the catalog number or key record id already exists.



Click OK to return to the screen and change the catalog number.

To save the records you copy, click on Save and Close or Save at the lower right corner of the screen or press F2. To cancel records without saving them, click the Cancel link at the lower right corner of the screen.

If the record you copy does not include all the mandatory data, you will be prompted to complete the mandatory fields or save the new record as a draft record. Refer to Chapter 2, Cataloging, for information on saving a catalog record as a draft record. The on-line field help and this manual identify the mandatory fields for catalog records and associated modules. You cannot copy and save a record without including the mandatory data.

D. Modify This Record

1. *When do I use the Modify This Record function?*

Use the Modify This Record function to change the contents of the record currently on the screen. You may change previously entered data or enter new information. This option places you in Modify Mode.

2. *How does this function work?*

To modify a record:

- click on the modify icon  on the button bar, *or*
- go to Edit on the menu bar and choose Modify This Record from the pull-down menu, *or*
- press the F10 key

A new window will open and you will see "Modify Mode" in the lower- right corner. You can then modify and save the record.

3. *How do I save the records I modify?*

To save the records you modify, click on Save and Close or Save at the lower right corner of the screen or press F2. To cancel records without saving the changes, click the Cancel link at the lower right corner of the screen.

If the record you modify does not include all the mandatory data, you will be prompted to complete the mandatory fields or save the new record as a draft record. Refer to Chapter 2, Cataloging, for information on saving a catalog record as a draft record. The on-line field help and this manual identify the mandatory fields for catalog records and associated modules. You cannot modify and save a record without including the mandatory data.

E. Delete Record(s)

WARNING! WARNING!
Deleted records are PERMANENTLY deleted and <u>not</u> retrievable.

1. *When do I use the Delete Record(s) function?*

Use this option to delete one or more selected records from the database. You can delete the record that is currently on the screen by choosing "Delete This Record." You can delete a group of records by choosing "Delete Multiple Records." Use caution when using this option.

You must have Administrator security rights to delete groups of records.

2. *How does this function work?*

To delete a single record:

- In Menu Mode, go to the record you wish to delete.
- Go to Edit on the menu bar and choose Delete Record(s)
- Choose Delete This Record.
- The program will ask if you are sure you want to delete the record. Click Yes to permanently delete the record. Click No to abort the deletion process and keep the record.

To delete a group of records, you must first activate a filter, tag set or select multiple records in the List Pane.

Refer to Chapter 7, Finding and Grouping Records, for information on creating a subset of your data.

Be extremely careful when using this option. There is only one warning before the system deletes the records. You should have a reliable backup of your data before using this function. See Section II of Chapter 9, for information on backing up your data.

To delete a group of records:

- Activate a tag set, filter or select multiple records in the List Pane of the records you want to delete.
- Go to Edit on the menu bar and choose Delete Record(s)
- Choose Delete Multiple Records.
- The program will ask if you are sure you want to delete the records. Click Yes to permanently delete the records. Click No to abort the deletion process and keep the records.

II. SPELL CHECK

A. Overview

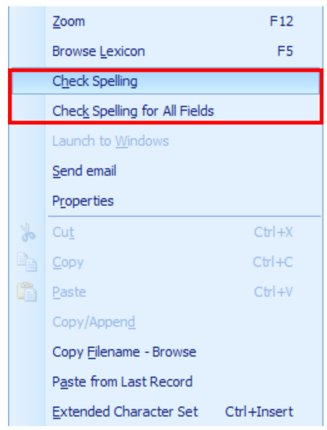
1. *Is there a spell check option in **ICMS**?*

Yes. ICMS includes a Spell Check feature that includes English, French, German, Italian and Spanish words. Spell Check identifies misspelled words, and suggests replacements. You can edit the word on the screen, look up an appropriate substitute, add words to the dictionary, or ignore the spell check suggestions. Spell Check is available in all modules except for supplemental records.

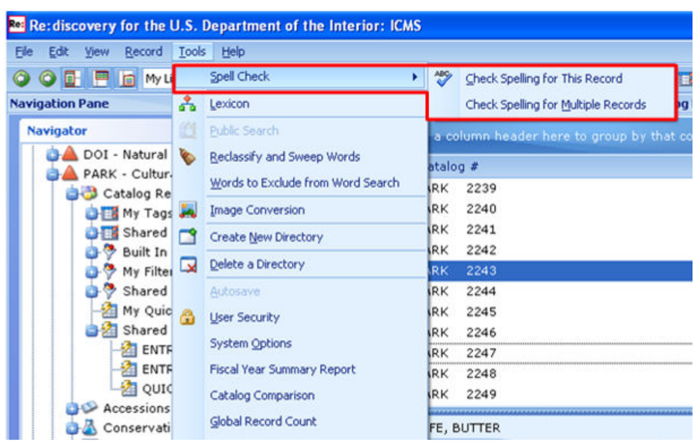
2. *How do I access Spell Check?*

There are 2 ways to access Spell Check depending on what mode you are in:

- In Add, Copy or Modify Mode, the Spell Check feature is available from the right-click menu.



- In View Mode, the Spell Check feature is available from the Tools menu.



3. *Can I spell check more than one field at a time?*

Yes. You can check the spelling for all fields in a record by using one of the following options:

- When in Add, Copy of Modify Mode, right-click in any field and choose the “Check Spelling for All Fields” option on the right-click menu.

- If you are in View Mode, both spell check options on the Tools menu will give you the option to check selected fields or all fields in the current record or group of records if a subset of your data is set.

4. *Can I spell check more than one record at a time?*

Yes. You can check the spelling on a group of records by activating a filter, tag set or selecting multiple records in the List Pane.

Once a subset is selected, choose Spell Check on the Tools menu and select "Check Spelling for Multiple Records".

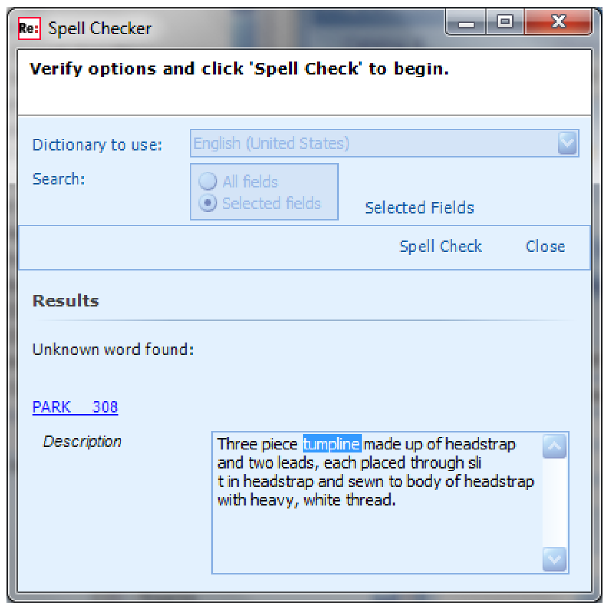
B. Using Spell Check

1. *How do I use the spell checker when I'm adding or modifying a record?*

To use the Spell Checker while in Add, Copy, or Modify mode:

- Right click in the field you want to check or any field if you intend to check them all.

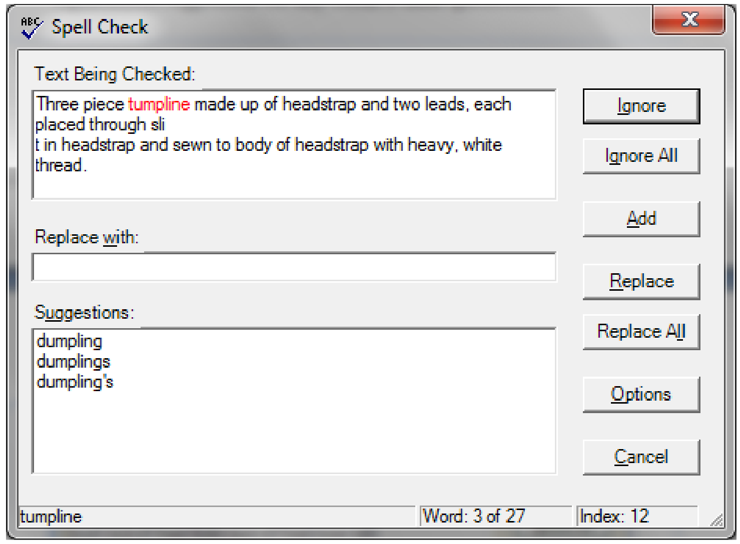
- Choose one of the spell check options on the right-click menu: "Check Spelling" or "Check Spelling for All Fields".



- The Spell Checker will start, automatically stopping at the first misspelled word it finds.

Note: The dictionary defaults to English and the appropriate fields to search are already selected based on which right-click option you selected. If no words are misspelled in the field or record, a message will appear indicating that there were no misspellings found.

- When a misspelled word is found, a second window opens immediately displaying the word in context. The spell checker will give some replacement suggestions for any words it finds questionable.



- If you wish to skip the questionable spelling, choose one of the following options:

Ignore — Ignores the one occurrence of the word.

Ignore All — Ignore all occurrences of the word in the current search.

Add — Allows you to add the word to the dictionary so that it will not be questioned in future searches.

- If you wish to replace the word with one of the suggestions, either double-click the word in the Suggestion box to automatically replace the misspelled word, *or*

  Single-click to highlight the word in the Suggestion box, which places it in the "Replace with" box, then choose one of the following options:

Note: You may also type your own replacement in the "Replace with" box.

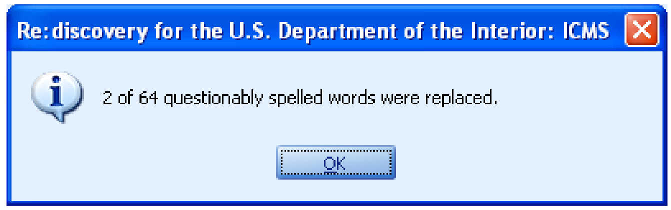
Replace — Replaces only this occurrence of the misspelled word with the word(s) in the "Replace with" box.

Replace All — Replaces all occurrences of the misspelled word with the word(s) in the "Replace with" box.

- The spell check will continue to search for other questionable words in the field(s). When the spell checker has completed searching, the Track Changes window will open allowing you to add a Cataloging Notes supplemental, if desired. If any history tracking fields were changed during the spell check, such as Location or Condition, the supplementals will also be included in the Track Changes window. Click OK to save the record with the new spellings.

WARNING: Do not cancel the Track Changes window. This will cancel any spelling changes you made as well.

- Next, a popup will show you a summary of what was found and/or replaced.



If spell check does not appear to be finding any misspelled words in any record or any field and all of your data entry is done in upper case, modify a record and enter a word in lower case in any field that is misspelled. Then, while still in Modify mode, right-click in the same field and choose Check Spelling. When it brings up the lower case misspelled word you just added, click on the Options button and uncheck the "Ignore words in Upper Case" option. See B.3 below.

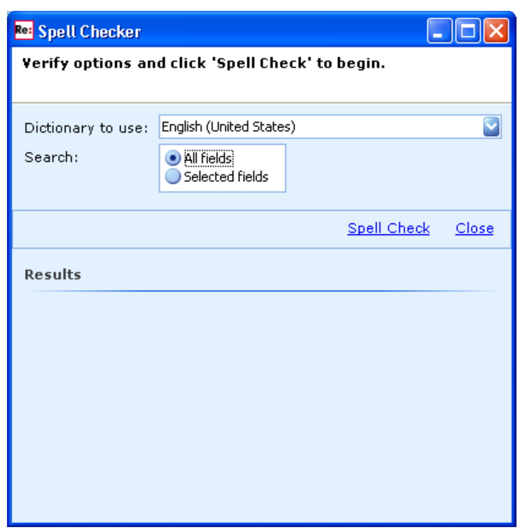
2. *How do I use the spell checker on a record or group of records that have already been saved?*

In View mode, you can spell check a single record or group of records by choosing one of the Spell Check options on the Tools menu.

If you do not have a subset of your data selected, the only option available while in View Mode is "Check Spelling for This Record". For more information on how to create a subset of your data, see Chapter 7, Finding and Grouping Records.

To use spell check in View Mode:

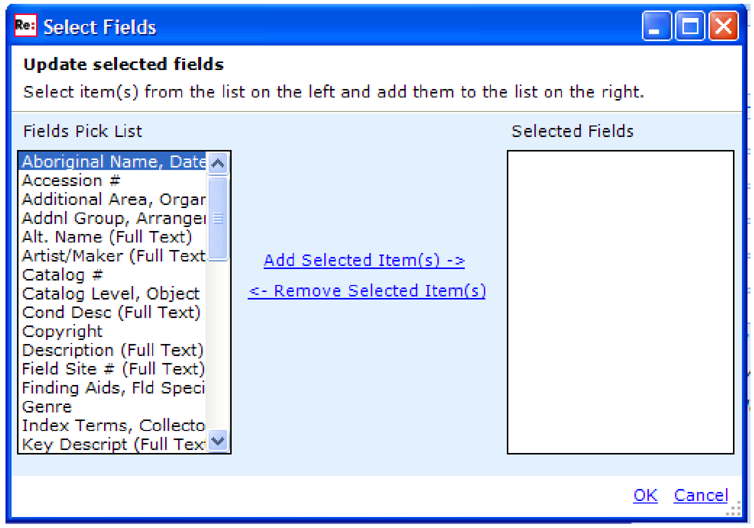
- After selecting either "Check Spelling for This Record" or "Check Spelling for Multiple Records", the following window will open:



- Select which dictionary to use (the program defaults to English).

- Then select if you wish to search All fields or only Selected fields.

- For Selected fields, a new window will open. All the fields available on the record will be displayed in the left column. Highlight each field that you would like to search and click <u>Add Selected Item(s)</u> to add them to the right column. When finished, click OK.



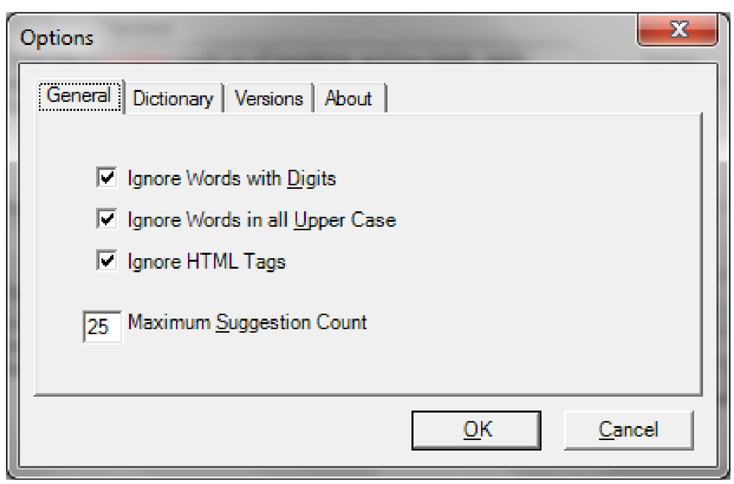
- After the fields have been selected, or you chose to search All fields, click <u>Spell Check</u> to start the spell checker.

- Spell check will begin and will highlight questionable words as it finds them. The Results section will show the catalog record number and field where the questionable word is located. Continue as in B.1 above to correct or ignore these words.

3. *What other options can I set in Spell Check?*

You can set additional options for spell checking from the Spell Check window. **Note:** You have to perform a spell check and the system has to find a questionable word to access this options window.

In the Spell Check window, click the Options button.



You can choose to:

- Ignore words with numbers by checking "Ignore Words with Digits"

- Ignore Words in all Upper Case. You should uncheck this option if all of your data entry has been done in upper case. Otherwise, no misspelled words will be found.

- Ignore HTML Tags

- Set the maximum number of words that appear in the suggestion box.

These settings with the exception of the Maximum Suggestion Count will be remembered for your user settings whenever you use the Spell Checker.

III. MODIFY ALL

A. Overview

1. *When do I use the Modify All function?*

Use Modify All to make mass changes to a group of existing records. It allows you to change the same information in more than one record at a time. It is available in all directories, catalog records and associated modules.

Modify All is not available unless you have limited your visible data by activating a Filter, Tag Set, or selecting multiple records in the List Pane using shift-click or control-click. See Chapter 7, Finding and Grouping Records for information on activating Filters, Tag Sets and List Pane options.

2. *Do I need special security rights to use Modify All?*

Yes. You must have Administrator rights or specific Modify All rights for a directory in your security profile. See Chapter 9, Security for more information about user security rights.

3. *Can I use Modify All on supplemental records?*

No. Supplemental records are not available for the Modify All function. However, if you use Modify All on a history tracking field such as Location, Object Status, or Condition, the Track Changes window will be activated allowing you to enter supplemental information for Location and Condition Reports as well as Cataloging Notes.

If you need to update a specific supplemental, use the Mass Supplemental Update function. See Section I of Chapter 3, Supplemental Records for information on the Mass Supplemental Update function.

4. *How do I access the Modify All function?*

Go to Edit on the menu bar and choose Modify All Records.

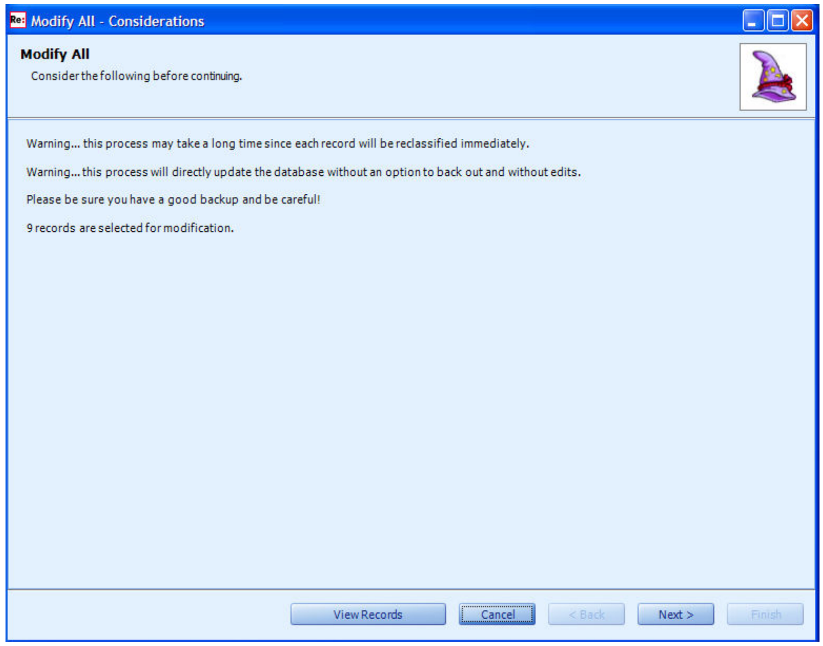
Note: If you do not have the proper security rights or you have not limited your visible data using a Filter, Tag Set, etc., the option will be inactive.

B. Using Modify All Records

WARNING: Modify All is a powerful tool! It will replace all the data in a field with the data you enter. If you want to change only some data in a field, or only one subfield in a formatted memo field, see the Global Search and Replace section in this chapter. It is highly recommended that you make a backup of your directory before proceeding with Modify All (see Chapter 9, Backup Data).

1. *How do I use the Modify All Records option?*

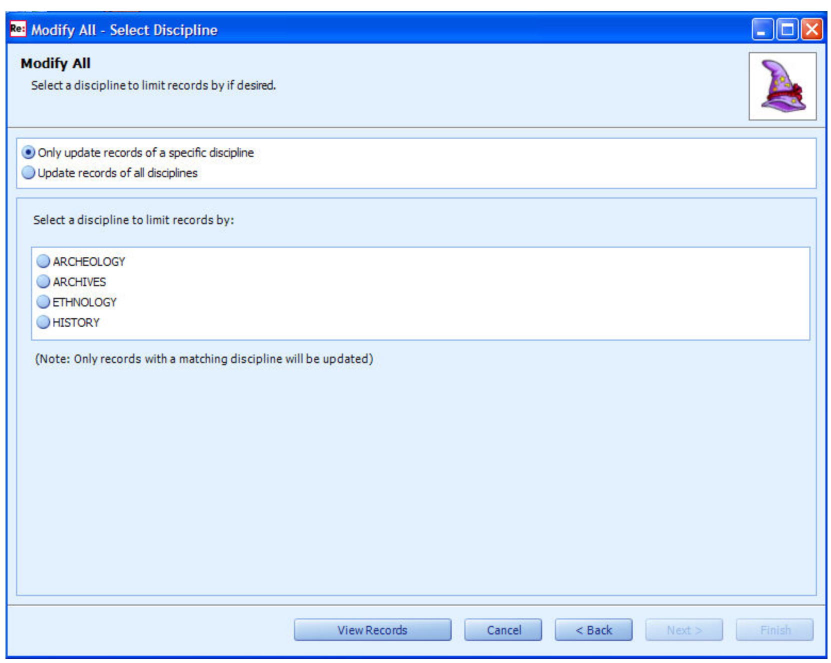
With your visible data limited by one of the methods mentioned above, choose Modify All Records on the Edit menu and the Modify All wizard window will open.



- The system message warns you that the process may take a long time since each record will be reclassified immediately. It will also directly update the database without an option to back out and without edits.

- The number of records that are selected for modification are indicated. You can view the records that will be modified by clicking the View Records button at the bottom of the window.

- Click Next.

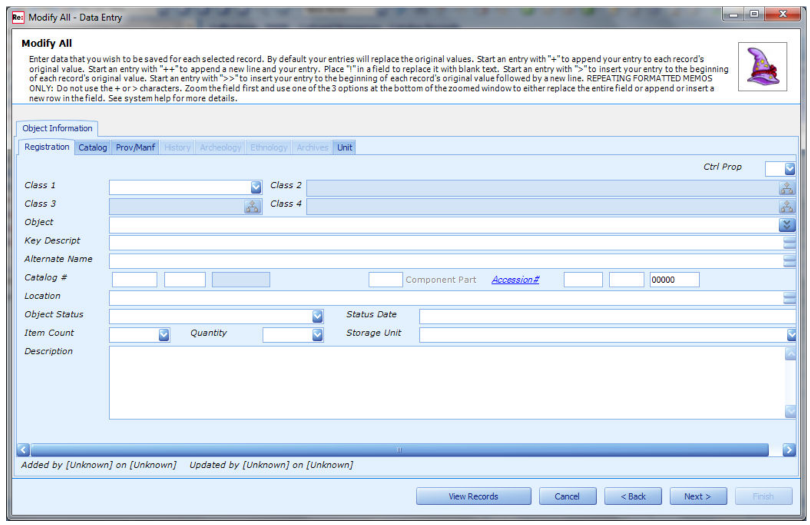


- You may limit the records to be modified by discipline, if desired.

Only update records of a specific discipline: If your data entry screen has discipline specific fields, you may wish to limit Modify All to a specific discipline. Select which discipline type from the list. Only the records in your visible data with a matching Class 1 discipline will be affected, and the fields on the discipline-specific screen for the selected discipline will be available for modification.

Update records of all disciplines: Choose this option if you wish to modify all records in your visible data, regardless of their discipline. All records in the visible data will be affected, but the fields on the discipline-specific screens will not be available for you to change.

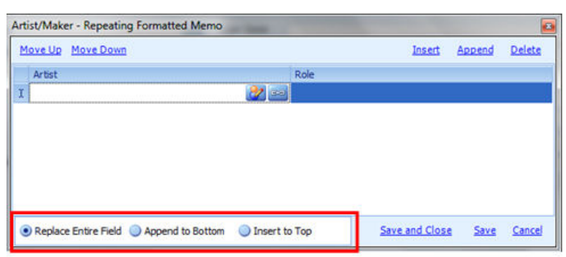
- Click Next to continue once you have chosen whether to limit records or update all records. A blank data entry screen will open.



- Enter the data that you want to change in one or more fields.

  Remember that the text you add will **completely replace** any data that may already be in the field, for **all** the records in the visible data.

  Note: Repeating formatted memo fields have additional options when you expand the field for either replacing the entire field or appending the entry as a new row to the top or bottom.

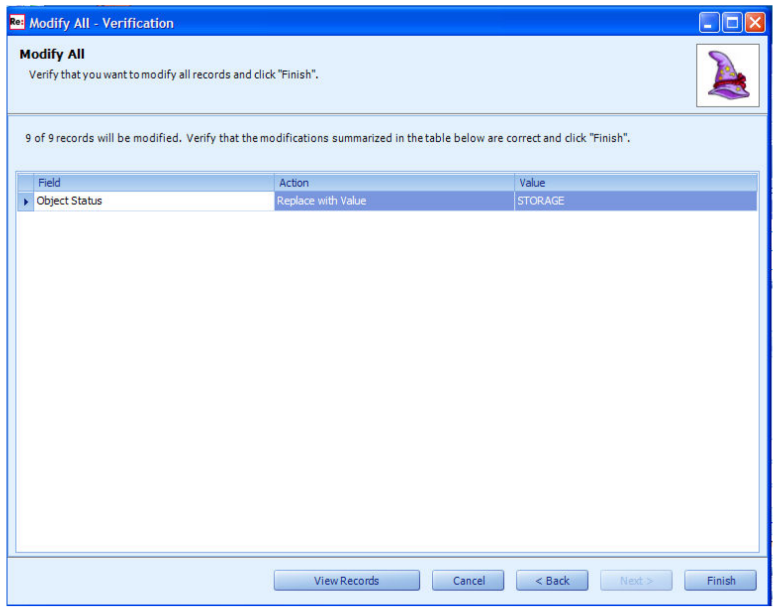


  - Replace Entire Field: will overwrite the data in the repeating formatted memo field.
  - Append to Bottom: will add a new row at the bottom of the repeating formatted memo field.
  - Insert to Top: will insert a new row at the beginning of the repeating formatted memo.

For regular formatted memo fields, you can change individual subfields without overwriting the previous data in the remaining subfields.

To activate the Class 2, Class 3, and Class 4 fields, first enter a discipline in Class 1. This will change the discipline on **all** records in the visible data. You must enter each class field in order for the subsequent class field to become available.

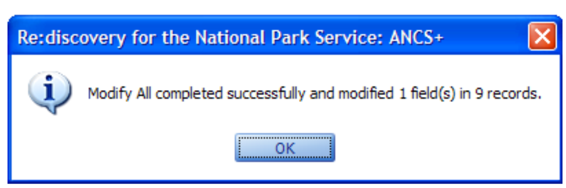
- When finished, click Next. The system will display the number of records to be updated and the data that will be affected.



- To update the records with the new field values, click Finish.

- For catalog records, the Track Changes window will appear with at least the Cataloging Notes supplemental listed. If you entered data into a history tracking field such as Location or Condition, the supplementals associated with these fields will also be listed. Complete the supplemental information and click OK. **Note:** If you change the Object Status field with Modify All, the Object Status supplemental will also automatically be updated but will not appear in the Track Changes window. Refer to Chapter 3 for information on supplemental records.

- When complete, the system will tell you the number of fields and records updated.



2. *How can I blank out a field using Modify All?*

You can use Modify All to delete all data from a text field for a group of records. Enter a single exclamation point, "!", in the field you wish to blank out. **Note:** You cannot blank out numeric or true date fields.

3. *Can I append data to a field without overwriting the existing data?*

Yes. The Modify All function also includes the ability to append additional data to existing data in a field, without overwriting the existing data. You can append data to the beginning or end of the field.

To append data to the end of the field using the Modify All function, including a + or ++ before the new data will cause the new data to be appended to existing data, rather than replacing it.

- + (plus) before your new data will append the data to the end of the last line of existing data.

- ++ (plus plus) before your new data will append the data on a new line after the last line of existing data.

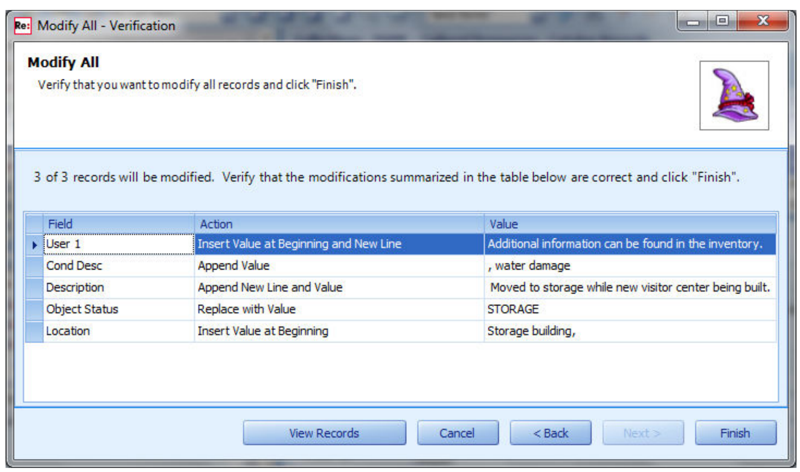
The verification page that lists the fields and the action to be taken will indicate that the data will be appended to the existing data – e.g., "Append Value" or "Append New Line and Value".

To insert data at the beginning of the field using the Modify All function, including a > or >> before the new data will cause the new data to be inserted before the existing data, rather than replacing it.

- > before your new data will insert the data before the existing data.

- >> before your new data will insert the data before the existing data followed by a new line.

The verification page that lists the fields and the action to be taken will indicate that the data will be inserted at the beginning of the existing data – e.g., "Insert Value at Beginning" or "Insert Value at Beginning and New Line".



4. *Can I make changes to the catalog number or accession number with Modify All?*

Yes, with limitations. For the NPS directory type, you can only change the acronym of the catalog number with Modify All. You cannot change the number section of the catalog number. For the DOI directory type, you should not change the catalog number using Modify All as it will overwrite the entire field which will give you duplicate catalog numbers.

For the Accession number, you can replace the entire number using Modify All.

IV. GLOBAL SEARCH AND REPLACE

A. Overview

1. *What is Global Search and Replace?*

Global Search and Replace is an option that allows you to locate words or phrases in a group of records, and replace them with new text for any or all of the records.

2. *When would I use Global Search and Replace?*

If you found a word consistently misspelled throughout your database, you could use Global Search and Replace to locate each occurrence of the word, and replace it with the correct spelling. You can search whole records, or limit your search to a specific field. Global Search and Replace requires that you limit your visible data with a Tag Set, Filter or by selecting multiple records in the List Pane. You cannot use Global Search and Replace unless you have limited the number of records you want to change. See Chapter 7 for information on creating Tag Sets and Filters.

3. *Do I need special security rights to use Global Search and Replace?*

Yes. You need to have Administrator rights or be given special permission within your security profile to use Global Search and Replace. See Section VI of Chapter 9 for information on security.

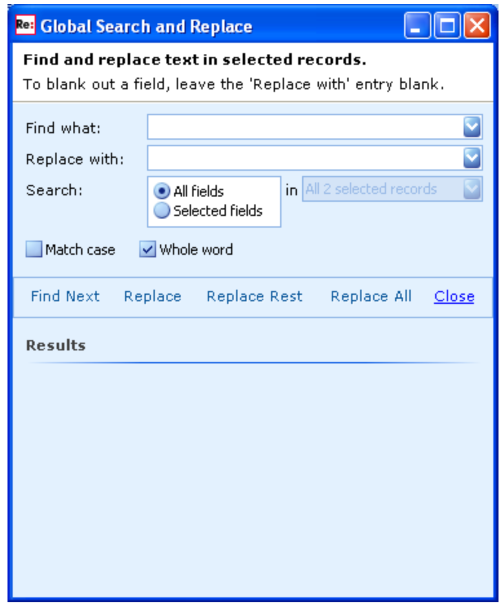
B. Using Global Search and Replace

It is highly recommended that you make a backup of your directory before performing any type of mass modification of your data.

1. *How do I access the Global Search and Replace function?*

To access Global Search and Replace:

- Activate a tag set, filter or select several records in the List Pane by using Ctrl-click or Shift-click.
- Go to Edit on the Menu Bar and select “Global Search and Replace”.
- You will get a system message indicating that this process may take awhile and will permanently update the records in the group. Click Yes to continue and the Global Search and Replace screen opens.



2. *How do I use Global Search and Replace?*

Global Search and Replace is easy to use. Follow these steps:

> ***The entries you make bypass the validation system in ICMS. You therefore run the risk of entering data that do not meet Bureau standards. Make sure you know the correct entries for the data you are changing. Make sure you know how an entry appears in the table, including the appropriate case (upper, lower, or mixed). If you make a new entry in a table field, the entry will appear on the modified records but not in the table. For the entry to appear in the table, you must access the field from the appropriate record screen and insert the entry in the table.***

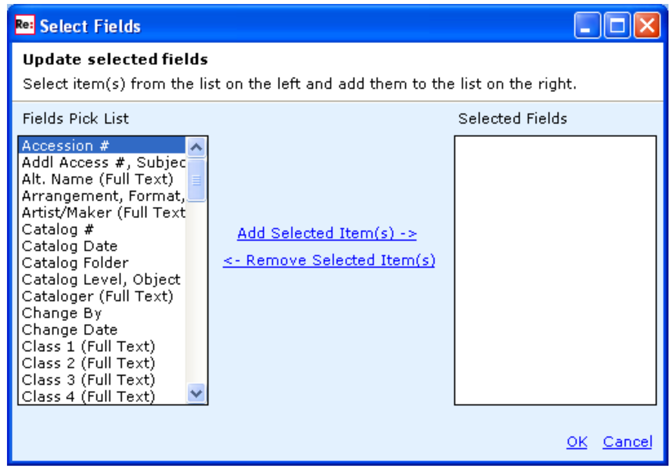
- Enter text for what to search in the "Find what" field. The down arrow shows a list of previously searched text.
- Enter replacement text in the "Replace with" field. Type the text in the format (upper case, lower case, mixed case) you want it to appear in the record. The down arrow shows a list of previously entered text. **Note:** To blank out a word or character string, leave the "Replace with" entry blank.
- Select your search options among what field(s) to search and how to make matches

All fields

This option allows you to search for the text in every field of the record (except supplemental data).

Selected fields

This option allows you to select specific fields to search for the text. Highlight one or multiple fields in the Fields Pick List column and click Add Selected Item(s) to insert the fields in the Selected Fields column. The fields that appear in the Selected Fields column will be included in the Search and Replace process.



Match Case

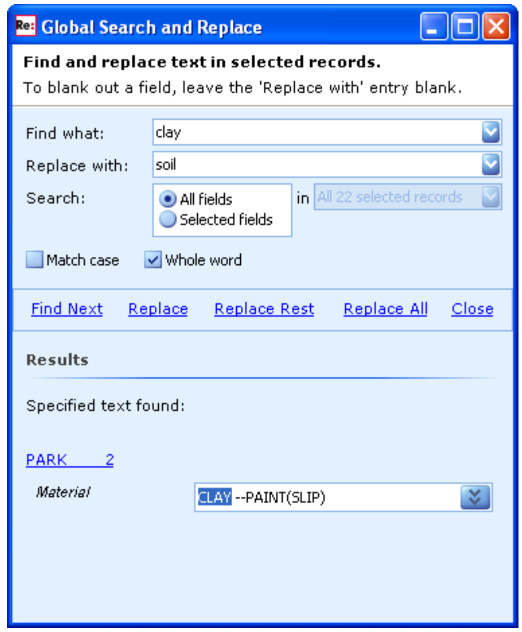
If this option is checked, Global Search will find only the occurrence of the word or character strings exactly as it is typed in the "Find what" field matching the case (upper case, lower case, or mixed case).

Whole Word

If this option is checked, Global Search will find and replace only whole words as typed in "Find what" instead of character strings. This will prevent words from being changed that may be part of the spelling of other words (for example, the word 'ship' is also part of 'ownership' but you only want to replace 'ship').

Note: If you are trying to find and replace punctuation only, do not use the Whole Word option. Punctuation is usually part of a word not a whole word by itself. For example, a semicolon between terms is part of the word that precedes it (brown; black; red;) just as quotes are part of the word they surround ("Title").

- To begin the search click **Find Next**. Global Search and Replace displays the field, catalog number, and the searched for text in context. To view the record, click on the hyperlinked catalog number (or, for associated module records, the record identifier such as accession number or name ID).



- To replace the text, use one of the following options: (Note: You may skip records by clicking Find Next without replacing.)

Replace

Click this option to replace the "Find what" text with your "Replace with" text for the currently displayed record.

Note: You can go through your group of records one at a time by clicking Find Next and then Replace to be sure you are replacing the correct data.

Replace Rest

Click this option to replace all "Find what" text with "Replace with" text, for all your search criteria, in the remaining records in your group of records. Any records that were skipped in the beginning will not be replaced.

Replace All

Click this option to replace all "Find what" text with "Replace With" text, for all your search criteria, in every record in your subset including skipped records.

- The Track Changes window appears when you click one of the replace options. This allows you to update the history tracking supplementals such as Catalog Notes, Location or Condition Reports if data in their corresponding fields is being replaced. See Section I.B of Chapter 3 for information on the History Tracking supplementals.

- A final count of how many records were updated is displayed. Click OK.

- Click Close to exit the Global Search and Replace window.

V. QUICK ENTRY

A. Overview

1. *What is the Quick Entry Function?*

The Quick Entry function allows you to edit existing records in a table format, rather than through the standard data entry screen. You choose the fields to use and create the format. You can use Quick Entry in any module and associated module.

Quick Entry is not available unless you have limited your visible data by activating a filter, tag set, or selecting multiple records in the List Pane using shift-click or control-click. Refer to Chapter 7, Finding and Grouping Records, for information on filters and tag sets.

You must have Administrator security rights or specific Quick Entry rights in a directory to use the Quick Entry function. See Section VI in Chapter 9 for information on user security.

2. *Are there limits to the number and type of fields I can use in Quick Entry?*

No. Quick Entry will work with all types of fields and as many fields as you desire. However, the number of fields visible when you print depends on paper orientation and the width of each field column.

3. *When will I use this function?*

Use Quick Entry to:

- compare data from several records as you edit,
- edit fields that appear on separate pages of a record,
- edit data in specified fields for consistency,
- browse data in specified fields in a group of existing records to locate unique or inconsistent entries,
- enter data into new records that you have preallocated (see Section VI of this chapter for information on preallocating records)

4. *Can I use Quick Entry for Supplemental Information?*

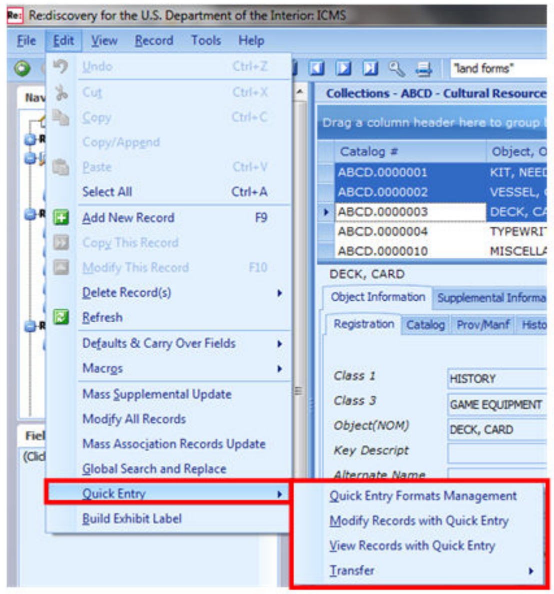
No. Supplemental records are not available in Quick Entry. However, if you modify a field through Quick Entry that is connected to a history tracking supplemental such as location, condition or object status, the Track Changes window will include these supplementals along with the Cataloging Notes supplemental when you save the quick entry records.

5. *Are authority tables available when modifying records through Quick Entry?*

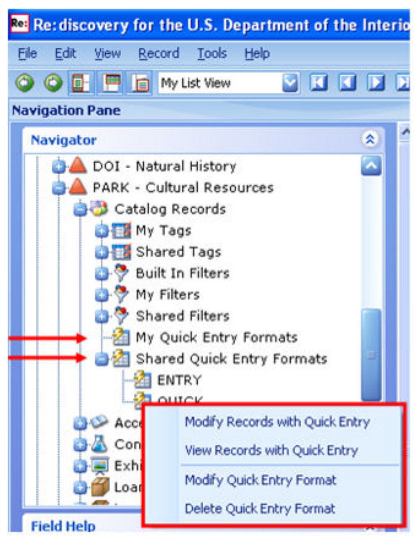
Yes. All fields in Quick Entry perform the same way as when you are modifying a single record. Authority tables are available and you can add to authority tables. Formatted memos and repeating formatted memos will expand to show their subfields.

6. *How do I access the Quick Entry function?*

Quick Entry is available from the Edit menu. Without a subset of data selected, only the Quick Entry Formats Management option is available.



Existing Quick Entry formats are also available from the Navigation Pane, under the “My Quick Entry Formats” or “Shared Quick Entry Formats” options within each module and associated module. Expand these by clicking the + in front. You will see a list of the Quick Entry formats available to you. Double-click on a quick entry format to activate it for modifying records. Right-click on a quick entry format for options to modify records, view records, modify the format, or delete the format.

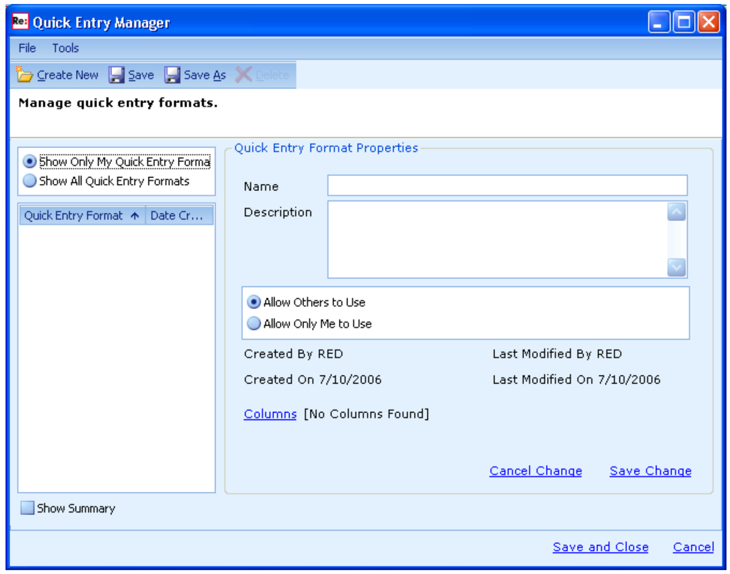


B. Creating a Quick Entry Format

1. *How do I create a Quick Entry format?*

You create a Quick Entry format using the Quick Entry Manager window. To access this window:

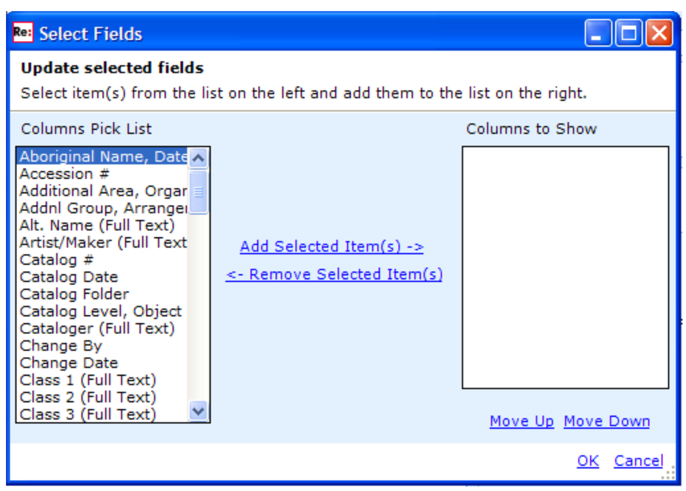
- Choose Quick Entry on the Edit menu.
- Select “Quick Entry Formats Management.” The Quick Entry Manager window will open.



- Click **Create New** on the toolbar or go to the File menu and select the Create New option.

- Enter a unique Name for the quick entry format, a Description (optional) and select who is allowed to use the new quick entry format (others or only you).

- Click **Columns** to select which fields to include in the quick entry format.



- Select the fields by highlighting them in the Columns Pick List on the left, then clicking Add Selected Item(s) to add them to the list on the right. Repeat this for each field that you wish to use. You can use Move Up and Move Down to change the order of the fields in the list. When you have selected all of the desired fields and have them in the desired order, click OK.

- The fields you chose for the format will be listed next to the Columns link in the Quick Entry Format Properties.

- When you have finished creating the new quick entry format, click Save and Close to save the format and close the Quick Entry Manager.

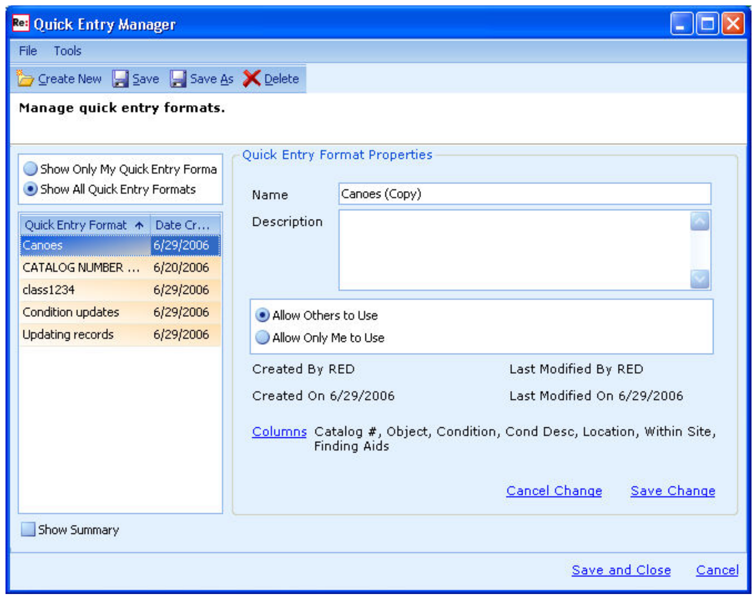
Note: This format can be used again and again with different data. Think of the format as a template.

2. *How do I edit or delete a Quick Entry format?*

To edit or delete a Quick Entry format:

- From the Edit menu, select Quick Entry and then "Quick Entry Formats Management", *or*

  From the Navigation Pane, right-click on the quick entry format and select "Modify Quick Entry Format" or "Delete Quick Entry Format".



- In the Quick Entry Manager window, select the format you wish to edit or delete. To see a complete list of formats, select the "Show All Quick Entry Formats" option. To see only your formats, select "Show Only My Quick Entry Formats."

Note: Only the user who created the format can make modifications to the original. To modify another user's Quick Entry format, first click Save As on the toolbar, then make the changes. The Name will have the word '(copy)' after it. You can change the name, if desired. The original format will remain unchanged.

- Make any desired changes to the quick entry format and click Save Change to save it or use Save As on the toolbar to save it with a new name.

- If you wish to delete a quick entry format, select it in the list and click Delete on the toolbar.

3. *How do I transfer a Quick Entry format to another directory?*

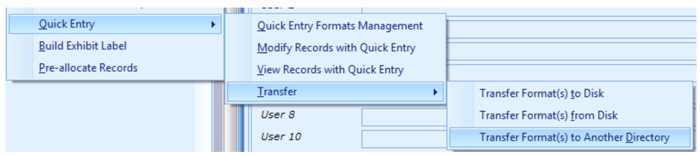
You can transfer Quick Entry formats to another directory within the same ICMS system or send it to another ICMS installation at a different location.

Note: Quick entry formats can only be transferred into like modules/directories as the one they are created in. For example, if you create a new quick entry format in a Cultural Resources style directory, you may only transfer it into another Cultural Resources style directory.

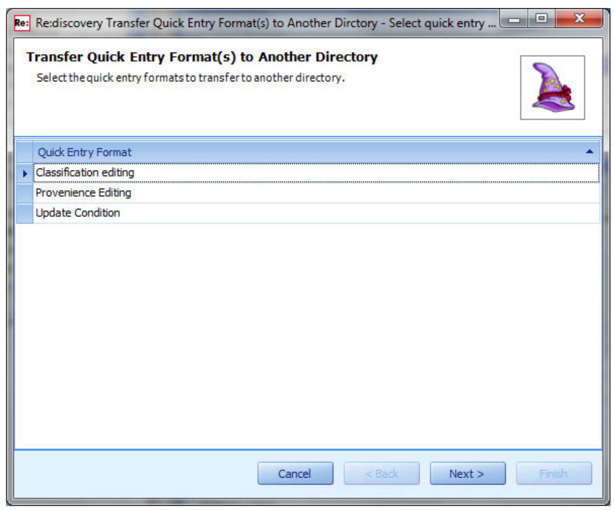
Transfer Format(s) to Another Directory

To transfer Quick Entry formats to another directory in the same installation:

- On the Edit menu, select Quick Entry → Transfer → Transfer Format(s) to Another Directory.

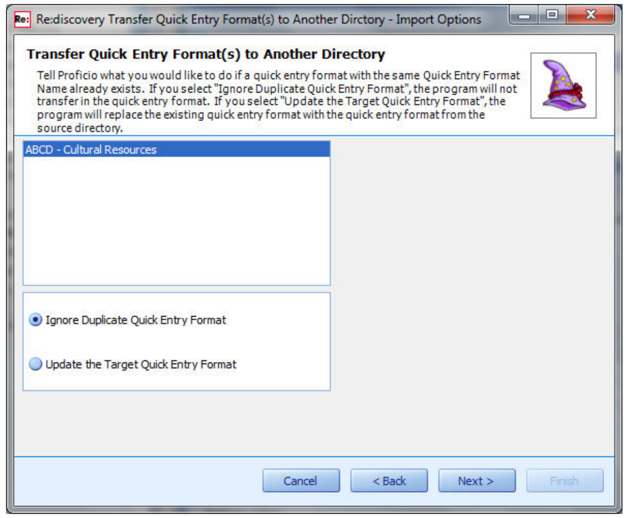


- A list of your existing quick entry formats will display.



- Highlight the quick entry format you want to transfer. You may select multiple quick entry formats by holding down the CTRL key and clicking on additional ones until you have highlighted all desired quick entry formats.

- Click Next.

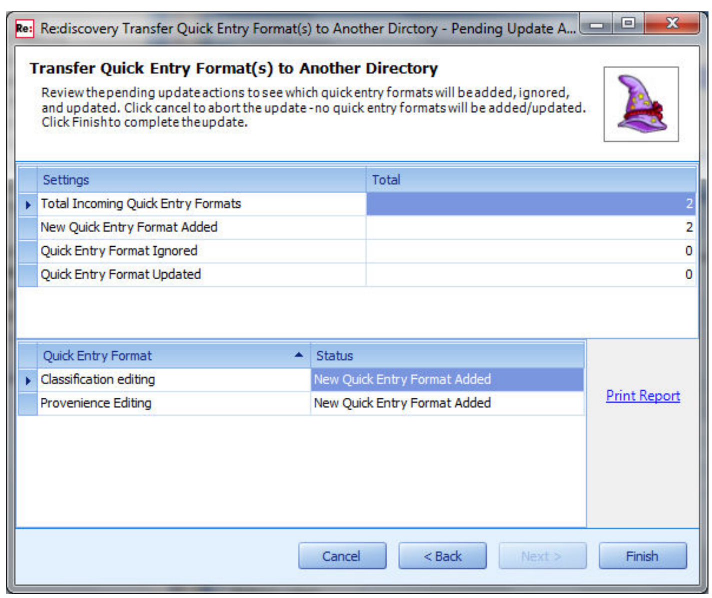


- Select the destination directory. **Note:** the program will only list the available directories of the same style in the same module as the directory you are transferring from.

- Then select an option for duplicate quick entry formats (i.e., ones that may already exist in that directory with the same name as those you are transferring in). You can either ignore duplicate formats or update existing formats that have the same name.

- Click Next.

- The program will display a summary of the quick entry formats being brought in, including their names and whether they will be newly added or updated.

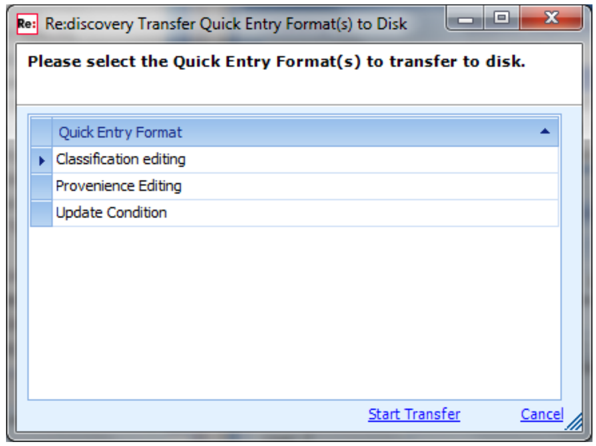


- Click Finish. Your quick entry format will be available for use in the other directory.

Transfer Format(s) to Disk

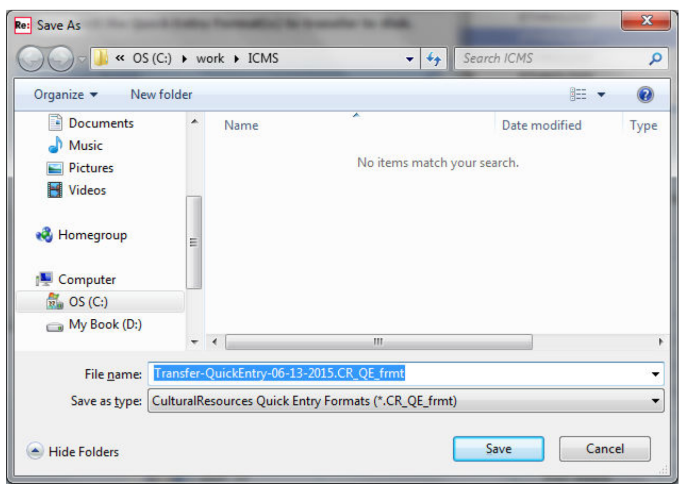
To transfer existing Quick Entry formats from one copy of ICMS to another:

- From the Edit menu, select Quick Entry → Transfer → Transfer Format(s) to Disk. A list of your existing quick entry formats will display.

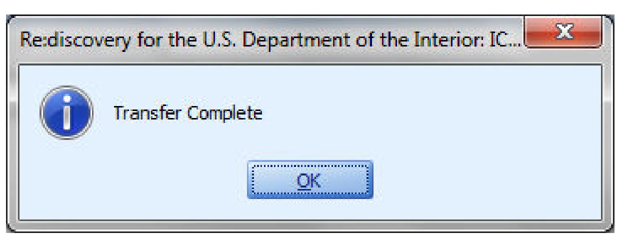


- Highlight the quick entry format you want to transfer. You may select multiple quick entry formats by holding down the CTRL key and clicking on additional ones until you have highlighted all desired quick entry formats.

- Click Start Transfer



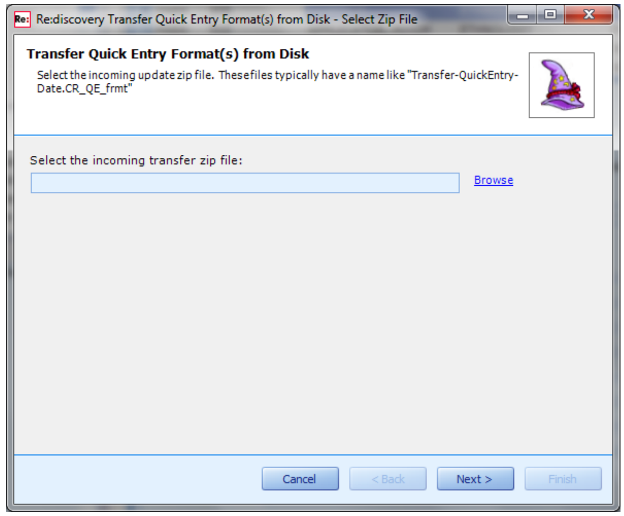
- Select the location to save the file as desired. You may keep the default File name or change it, but you MUST leave the default Save as type. Then click Save.



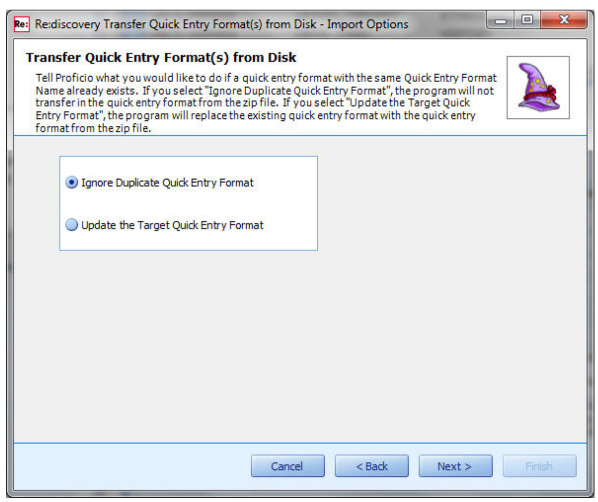
- When the transfer is complete, click OK.

Transfer Format(s) from Disk

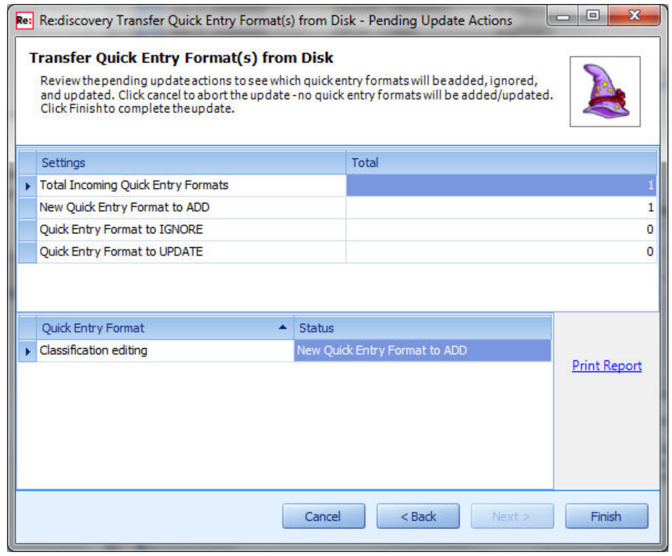
- In the ICMS system that you want to transfer the quick entry formats into, from the Edit menu, select Quick Entry → Transfer → Transfer Format(s) from Disk.



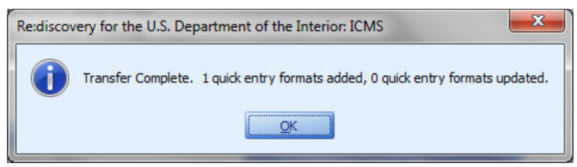
- Use the Browse link to navigate to the transfer file you created above and select it. Then click Next.



- Select an option for duplicate quick entry formats (i.e., ones that may already exist in this ICMS system with the same name as those you are transferring in). You can either ignore duplicates or update existing formats that have the same name. Then click Next.



- The program will display a summary of the quick entry formats being brought in, including their names and whether they will be newly added or updated. Click Finish.



- When the transfer is complete, click OK. The quick entry format is now available for use in your directory.

C. Using Quick Entry

1. *What can I do with Quick Entry?*

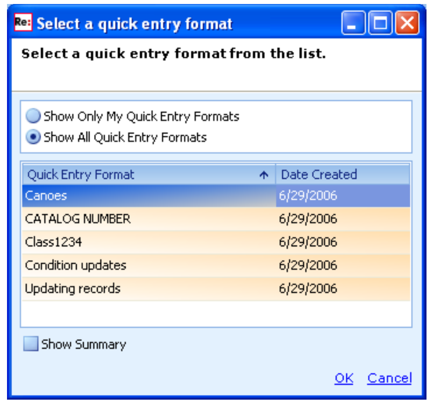
Once you have created your Quick Entry format, you can use it to:

- View selected fields for a group of records without editing
- Modify selected fields for a group of records
- Print a list of selected fields for a group of records.

2. *How do I view a group of records using Quick Entry?*

To view selected fields for a group of records without editing:

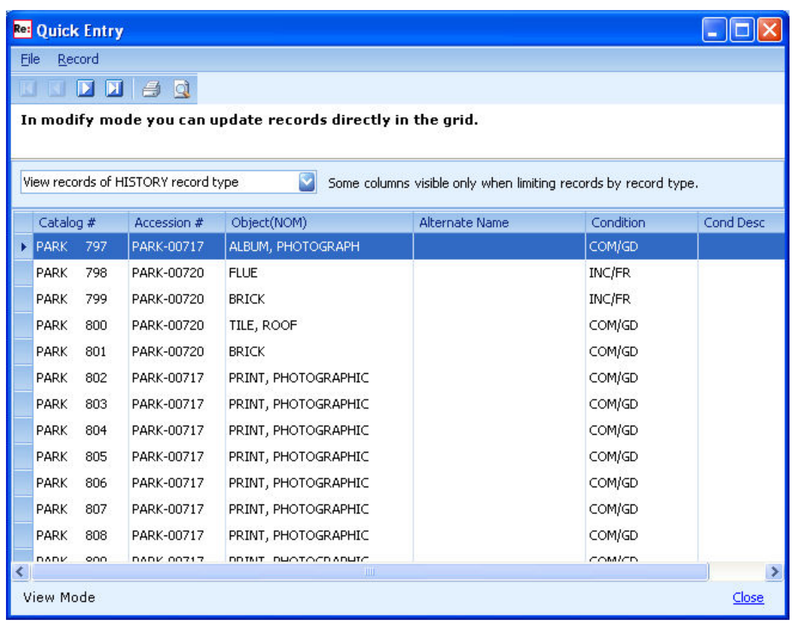
- With a subset of your data selected, go to the Edit menu and select Quick Entry and then “View Records with Quick Entry.”



- Highlight the quick entry format that you wish to use and click OK, *or*

- From the Navigation Pane, right-click on the quick entry format available under My Quick Entry Formats or Shared Quick Entry Formats and select “View Records with Quick Entry.”

- The Quick Entry screen will display the fields you selected in column format for the records in your visible data. You cannot update the records, only view them. If your quick entry format contains discipline-specific fields that only show up for a particular record type, there is a drop-down option at the top of the screen to “View ALL records” or limit your records to a particular discipline.

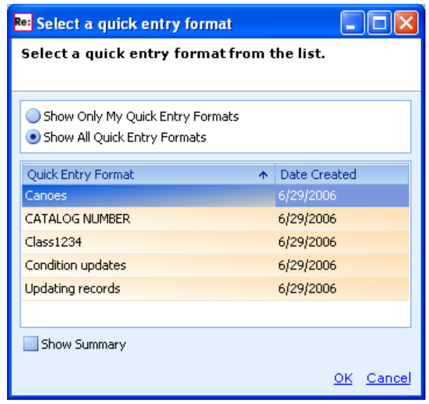


Note: To sort by a field, click on the column header for that field and the list will be sorted by that column. To resize the fields on the Quick Entry screen, click and drag on the division between column headers. If there are more columns than will fit across the screen, use the horizontal scroll bar at the bottom of the screen to scroll across all of the columns.

3. *How do I modify a group of records using Quick Entry?*

To modify a group of records with Quick Entry:

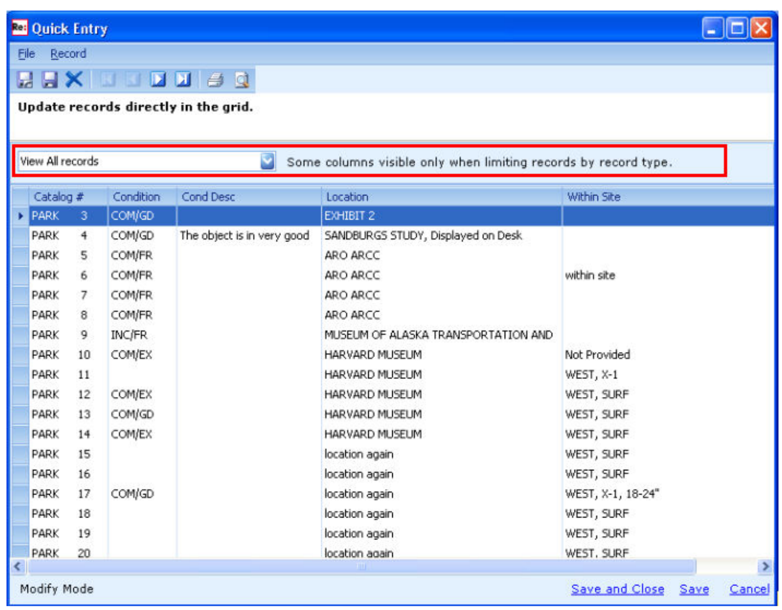
- With a subset of your data selected, go to the Edit menu and select Quick Entry and then "Modify Records with Quick Entry."



- Highlight the quick entry format that you wish to use and click OK, *or*

- From the Navigation Pane, under the module or associated module, either double-click the quick entry format or right-click on the quick entry format and select "Modify Records with Quick Entry."

- The Quick Entry screen will display the fields you selected in column format for the records in your visible data. You are allowed to edit the data from this screen. If your quick entry format contains discipline-specific fields that only show up for a particular record type, there is a drop-down option at the top of the screen to "View ALL records" or limit your records to a particular discipline.



- Press Tab or the arrow keys to move from field to field.

- Edit data directly in the table.

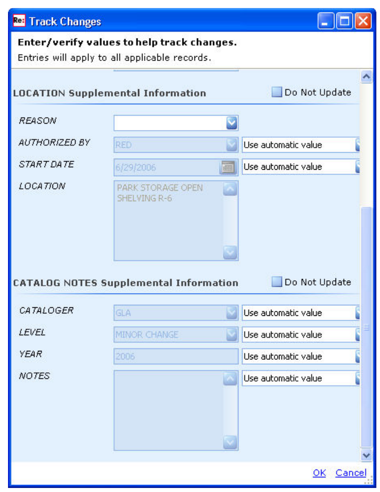
- Click Save to save changes as you are working, if you are editing many records at a time, or if you are interrupted before you finish.

Note: To sort by a specific field, click on the column header for that field. To resize the fields on the Quick Entry screen, click and drag on the division between column headers. If there are more columns than will fit across the screen, use the horizontal scroll bar at the bottom of the screen to scroll across all of the columns.

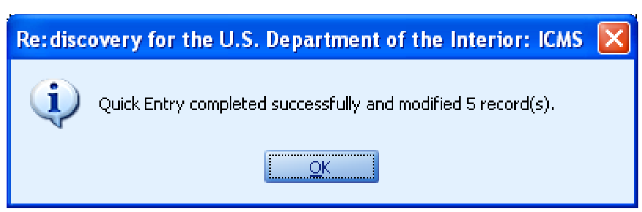
- If you decide that you do not want to save the changes you have made, click Cancel and no modifications will be saved (unless you have clicked Save while you were working).

- When you have made all the changes you need to in Quick Entry, click Save and Close.

- When you click Save or Save and Close, the Track Changes window will open to allow you to update the Catalog Notes supplemental and any other history tracking supplementals if the fields were updated in quick entry. Enter the supplemental information as necessary and click OK.



- The program will display how many records were modified by Quick Entry.



4. *How do I copy data from one field to another in Quick Entry?*

To copy data from one field to another in Quick Entry:

- Set your subset of data and choose the quick entry format to modify the records.

- Go to the field containing the desired data in the Quick Entry list and highlight the data you wish to copy.

- Press Ctrl-C to copy the highlighted data.
- Go to the field where you want to paste the data and press Ctrl-V to paste.
- To paste the same data over and over again, continue selecting a new field and pressing Ctrl-V as many times and for as many fields as you wish. The same information will continue to paste until you highlight and copy another selection.

5. *How do I print the Quick Entry list?*

To print the selected fields of the records in the quick entry list:

- With a subset of your data selected, go to the Edit menu and select Quick Entry and then "Modify Records with Quick Entry" or "View Records with Quick Entry."
- Highlight the quick entry format that you wish to use and click OK, *or*

- From the navigation pane, under the module or associated module you are in, either double-click the quick entry format or right-click on the quick entry format and select “Modify Records with Quick Entry” or “View Records with Quick Entry.”

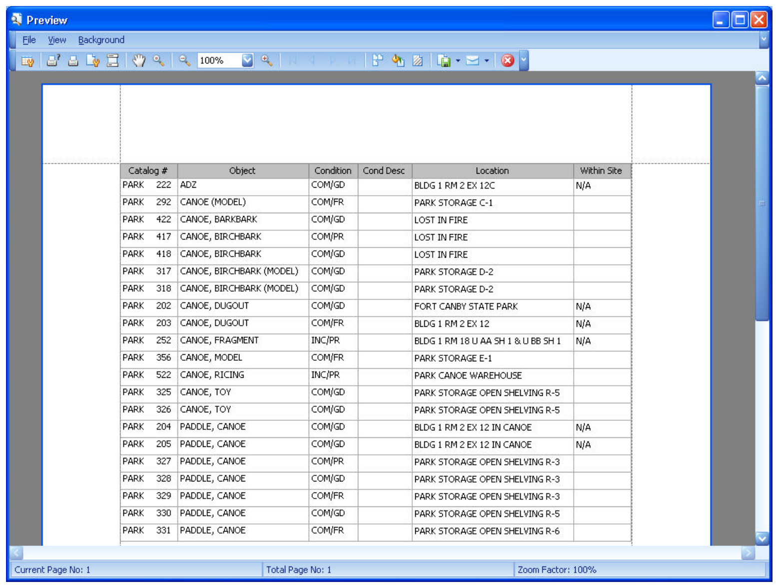
- When the Quick Entry list is open, click the Print button or Print Preview button on the toolbar.

Print

Sends the list to the printer immediately.

Print Preview

Print Preview will show you the list as it will print.



Catalog #		Object	Condition	Cond Desc	Location	Within Site
PARK	222	ADZ	COM/GD		BLDG 1 RM 2 EX 12C	N/A
PARK	292	CANOE (MODEL)	COM/FR		PARK STORAGE C-1	
PARK	422	CANOE, BARKBARK	COM/GD		LOST IN FIRE	
PARK	417	CANOE, BIRCHBARK	COM/PR		LOST IN FIRE	
PARK	418	CANOE, BIRCHBARK	COM/GD		LOST IN FIRE	
PARK	317	CANOE, BIRCHBARK (MODEL)	COM/GD		PARK STORAGE D-2	
PARK	318	CANOE, BIRCHBARK (MODEL)	COM/GD		PARK STORAGE D-2	
PARK	202	CANOE, DUGOUT	COM/GD		FORT CANBY STATE PARK	N/A
PARK	203	CANOE, DUGOUT	COM/FR		BLDG 1 RM 2 EX 12	N/A
PARK	252	CANOE, FRAGMENT	INC/PR		BLDG 1 RM 18 U AA SH 1 & U BB SH 1	N/A
PARK	356	CANOE, MODEL	COM/FR		PARK STORAGE E-1	
PARK	522	CANOE, RICING	INC/PR		PARK CANOE WAREHOUSE	
PARK	325	CANOE, TOY	COM/GD		PARK STORAGE OPEN SHELVING R-5	
PARK	326	CANOE, TOY	COM/GD		PARK STORAGE OPEN SHELVING R-5	
PARK	204	PADDLE, CANOE	COM/GD		BLDG 1 RM 2 EX 12 IN CANOE	N/A
PARK	205	PADDLE, CANOE	COM/GD		BLDG 1 RM 2 EX 12 IN CANOE	N/A
PARK	327	PADDLE, CANOE	COM/PR		PARK STORAGE OPEN SHELVING R-3	
PARK	328	PADDLE, CANOE	COM/GD		PARK STORAGE OPEN SHELVING R-3	
PARK	329	PADDLE, CANOE	COM/FR		PARK STORAGE OPEN SHELVING R-3	
PARK	330	PADDLE, CANOE	COM/GD		PARK STORAGE OPEN SHELVING R-5	
PARK	331	PADDLE, CANOE	COM/FR		PARK STORAGE OPEN SHELVING R-6	

You have the following options on the Toolbar from the Print Preview window:

- Customize: Set up various printing options for the current view.
- Print: Opens the printer dialog box.
- Print Direct: Sends the list to the printer immediately.
- Header & Footer options: Include a header and/or footer on the page.
- Background: Change the color or add a watermark (see menu option)
- Export: Export the list in various file types.
- Email: Email the list in various file types.

VI. PRE-ALLOCATE RECORDS (NPS only)

A. Overview

Pre-allocate records is only available in the NPS Cultural and Natural History directory types.

1. *What is the Pre-allocate Records function?*

The Pre-allocate Records function allows you to pre-assign catalog numbers to a defined set of empty catalog records. The Pre-allocate Records function is a security-protected function. You must have Administrator security rights to activate this function.

2. *Why would I need to pre-allocate records?*

Pre-allocating records is one way to reduce data entry time. Sites that do a great deal of cataloging, such as the archeology centers, will be more likely to use the Pre-allocate Records function alone or with the other functions described in this chapter. Many parks with relatively stable collections have no need for this function.

3. *When would I use the Pre-allocate Records function?*

Use this function when you want to allot certain catalog numbers for a specific purpose, such as:

- You want a particular staff cataloger or contract cataloger to use a particular string of catalog numbers.
- You have a subject area specialist identify and describe artifacts and you want to include this information in selected fields on the catalog record.
- You know that you will be entering several consecutive records, and you don’t want to enter the new catalog number each time you begin a new record.
- You want to enter information quickly in columnar format.

4. *How would I pre-allocate records to a staff or contract cataloger?*

Use the Pre-allocate Records function together with the Create a New Directory and Transfer functions to give the cataloger a separate directory with pre-assigned catalog numbers. Refer to Chapter 9, Tools, for information on creating a new directory. Refer to Chapter 8, Moving and Sharing Data, for information on the Transfer functions.

The Pre-allocate Records function will create empty records with sequential catalog numbers. Transfer these records into the cataloger’s directory leaving the empty records in your main database as place holders.

When the cataloger is done, check the work to make sure that it is acceptable and then transfer the completed records back into the master database updating the target records. The completed pre-assigned catalog records will overwrite the empty records in your main database.

5. *How would I pre-allocate records to a subject area specialist?*

Use the Pre-allocate Records function together with the Import/Export function to give the expert a set of fields to complete. Refer to Chapter 8, Moving and Sharing Data, for information on the Import/Export function.

The Pre-allocate Records function will create empty records with sequential catalog numbers. Export these records into whatever database or spreadsheet format that the specialist is comfortable using.

When the specialist is done, import the records back into the master database updating the target record and make whatever additions necessary to complete the records.

6. *How would I pre-allocate records to enter several records in a row?*

Use the Pre-allocate Records function to have the system automatically provide the next sequential number in the set of records.

7. *How would I pre-allocate records to enter records in a columnar format?*

Use the Pre-allocate Records function together with the Quick Entry function to produce a set of records in a list format. Refer to Section V of this chapter for information on the Quick Entry function.

Use the Pre-allocate Records function to set up a group of records. Create and activate a tag set or filter of these records before using Quick Entry.

B. Pre-allocating Records

1. *Where is the Pre-allocate Records function located?*

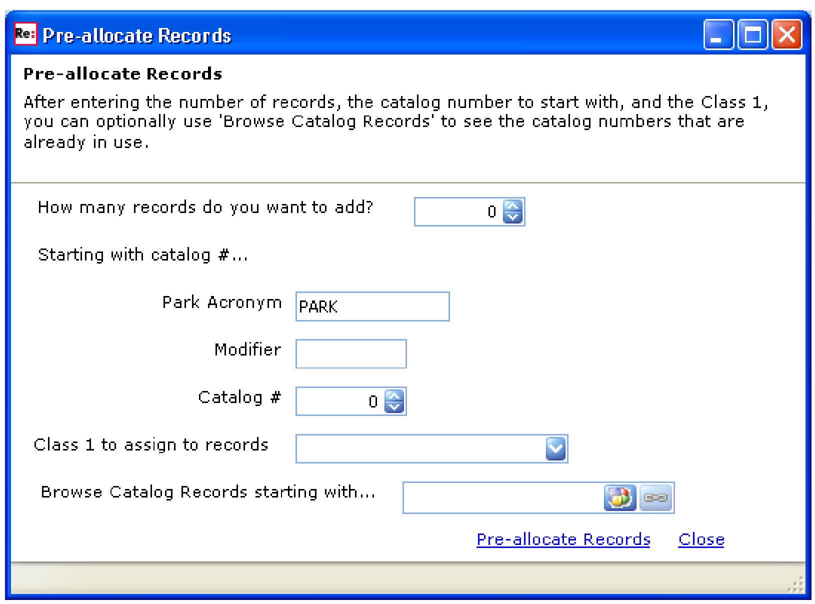
Pre-allocate Records is located on the Edit menu in the collection module directories.

You must be in the Cultural Resources directory to pre-allocate Cultural Resources records. You must be in the Natural History directory to pre-allocate Natural History records.

2. *How do I pre-allocate records?*

To pre-allocate records:

- From the Edit menu, click on Pre-Allocate Records. The Pre-allocate records window will open.



- Enter the number of records you wish to create in the "How many records do you want to add?" box.

- Next, enter the catalog number for the beginning number to create.

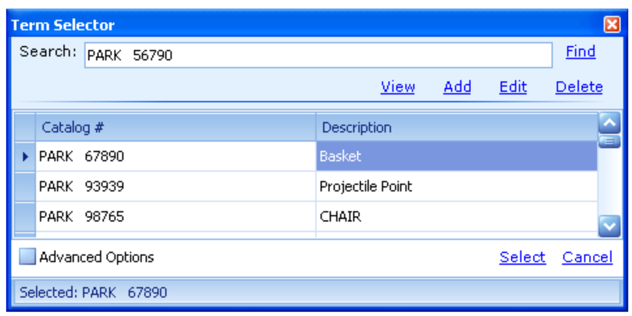
  Park Acronym: Enter your park acronym. **Note:** The Park Acronym will automatically fill in with the acronym from the record you were viewing before you started the pre-allocate record function. You can change this acronym if necessary.

  Modifier: Enter the collection modifier, if applicable.

  Catalog #: Enter the first number that you wish to pre-assign.

- In “Class 1 to assign to records”, use the pull down menu to choose the discipline for Classification line 1. For example, choose “ARCHEOLOGY” if the cataloging project is an archeological collection. This will fill in the Class 1 entry for all of the records you are pre-allocating. If your cataloging project includes more than one discipline, you will have to pre-allocate the records in separate groups to assign the appropriate Class 1 entry to each group.

- “Browse Catalog Records starting with” allows you to view the catalog records in your current system to ensure that you are starting with a catalog number that does not already exist. After you complete the catalog number above, this field will fill in automatically with the beginning number you chose. Click the collection icon  next to the number to view the list of catalog records in your current directory.

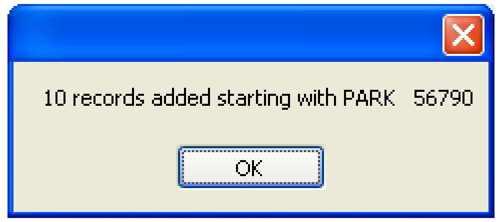


  You can check this list to make sure that the numbers you are creating do not already exist in your directory. Click Cancel when finished viewing.

Be very careful that the number range you enter does not include existing catalog numbers. The pre-allocate records function bypasses system edits for duplicate catalog number checking.

- Click Pre-allocate Records at the bottom of the window to generate the catalog records.

- When the records have been generated, you will get a system message indicating the number of records created and the beginning catalog number for these records. Click OK.



Note: All records created will also have “DRAFT RECORD” entered in the Object Status field.

- Click Close to close the Pre-allocate Records window.

The pre-allocated records will appear in sequential order in the appropriate directory.

VII. DEFAULTS AND CARRY OVER FIELDS

A. Overview

1. *What are Defaults?*

Field defaults are another method of speeding data entry. By setting certain repeated data as a "default," it will appear on each new record added to the database.

Example:
You may be cataloging a large group of objects in a storage cabinet. If you set the location field to default to "Storage Room A, Cabinet 1" for each new record, then you would not have to type it each time.

2. *What are Carry Over fields?*

Carry Over fields fill a new record with data from the record that was on the screen before you added the new record. This option lets you add data that is similar from record to record, but not exact enough to allow setting a Default value.

Example:
A series of objects may all require a complex reference number, the same on each record except for the last character. You could set the reference number field to carry over, so that on each new record you only have to increase the last digit by one.

3. *How does this function work?*

ICMS includes two types of default accounts: master system defaults and user defined defaults accounts. Master System Defaults, which everyone can use, come preinstalled in your system and cannot be edited or deleted. Each user may also establish his or her own User Defaults, appropriate for a specific project. Each user can create multiple accounts to use for different projects.

4. *What are Master System Defaults and Carry Over Fields?*

The Master System Defaults are always active in cultural resources, natural history and archives directories. They assist in data entry by automatically filling in data for specific fields, thereby making data entry easier for those fields.

For NPS style CR, NH and Archives directories, the acronym and collection designation are set to carry over in the following fields:

- Catalog number in catalog records, archival levels, conservation and maintenance.
- Accession number in catalog records, archival levels, and accessions
- Loan ID in Incoming Loans

In all CR and NH directory styles, Ctrl Prop in catalog records has a default entry of "N" and Deac Status in deaccessions has a default entry of "PENDING".

In all Archives directory styles, the Collection number, Series number and File unit number are set to carry over at the various archival levels.

Note: Master system defaults will override any other user defaults account settings.

5. *What is the Carry Over from Parent option in Archives directories?*

The 4-level archives directory has a second option for carrying over fields. Because of the hierarchical relationship of records in archives, you can set a field at a specific level of archives to carry over data from the parent record.

For example, on a File Unit archival record, the hierarchical parent is the Series level record, and you might want the Creator field and other data from that Series record to carry over to the File Unit record.

Note: You will see a second check box for the Carry Over from Parent option when creating your user defaults account in a 4-level archives directory.

6. *Where can I create Defaults and Carry Over Fields accounts?*

You can create Defaults and Carry Over Fields accounts in any module and associated module in the program.

You cannot create defaults for supplemental records.

7. *How do I access the Defaults and Carry Over Fields function?*

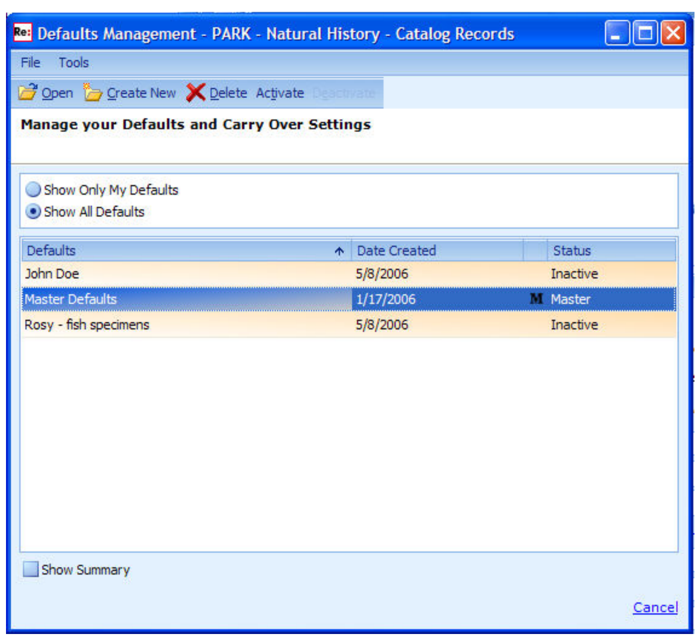
Defaults and Carry Over Fields is available from the Edit menu. You can choose the following options from the submenu:

Defaults Management
Create New Defaults
Activate Defaults
Deactivate Defaults

The quick links to **Create New Defaults**, **Activate Defaults** and **Deactivate Defaults** are all available within Defaults Management which allows you to manage everything from one screen.

Defaults Management

The Defaults Management window allows you to view, add, modify, delete, activate or deactivate defaults and carry over fields.



Create New Defaults

Use this option to create your own personal defaults accounts. You can allow others to use the accounts but only you or the system administrator can change them.

Activate Defaults

Use this option to bring up the list of available defaults accounts. Select an account and click Activate on the toolbar.

Deactivate Defaults

Use this option to clear all existing default settings, either master or user defaults accounts.

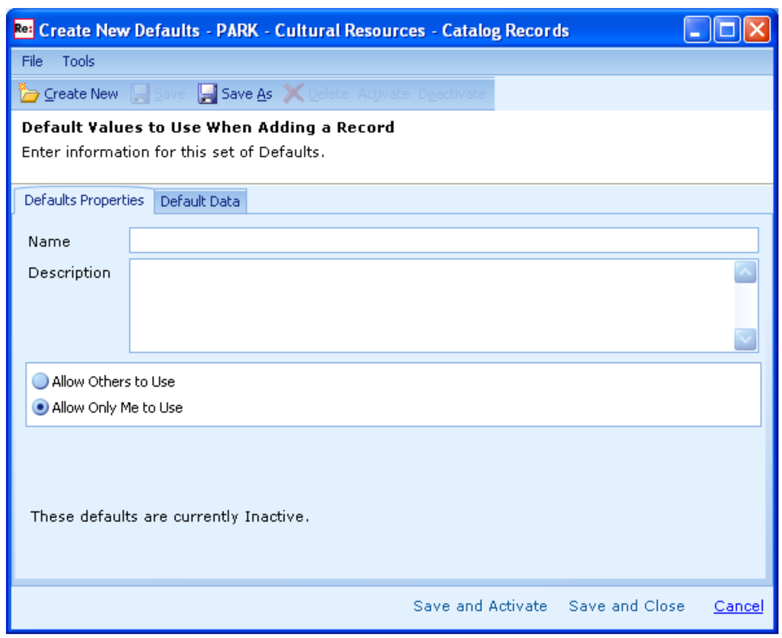
B. Setting Defaults and Carry Over Fields

1. *How do I create a new defaults and carry over fields account?*

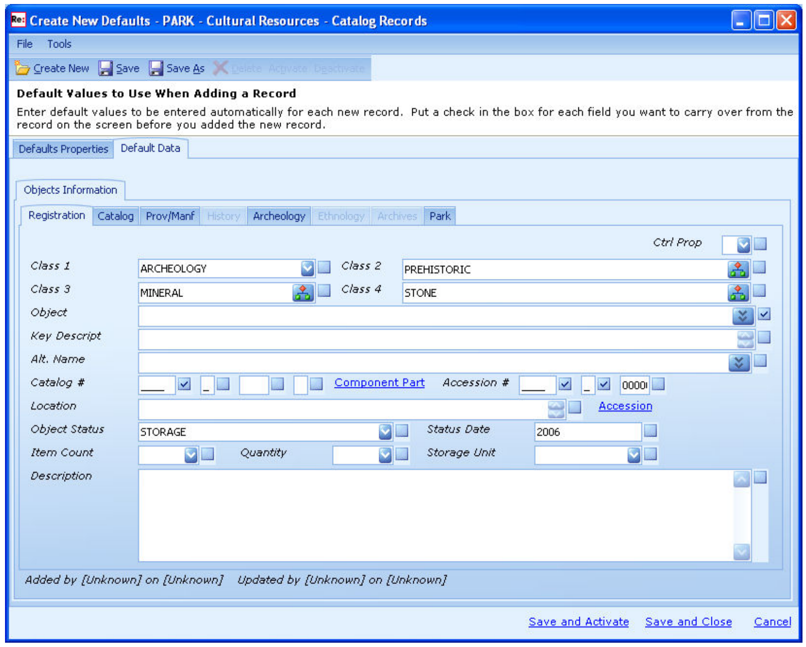
To create a new defaults account:

- From the Edit menu, select Defaults and Carry Over Fields.
- Then, select Create New Defaults, *or*

  Select Defaults Management and click the **Create New** button on the toolbar in the Defaults Management window.



- Enter a unique Name for the new defaults account.
- Enter a Description (optional)
- Select who is allowed to use the new defaults account: Allow others or only you.
- Click on the Default Data tab to set your default values and carry over fields.



- To create default entries, type in the values you want to be automatically entered for each new record or select terms from the authority tables. You can enter data for as many fields as you like. Select the different tabs to enter data on those pages. **Note:** If you enter a discipline in Class 1, that discipline tab will become active for you to type default entries in the discipline fields. You cannot set a default for Controlled Property; it is already set to enter 'N' when you add a record.

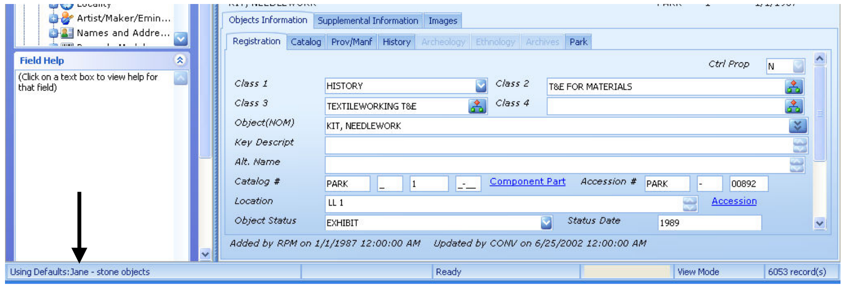
- To activate carry over fields, check the box at the end of each field you want to carry over. **Note:** Some fields are already set as carry over, such as the park acronym for Catalog # and Accession # in the NPS directories.

  In 4-level archives directories, there are two check boxes next to each field. The first check box is for the standard carry over from previous record at the same archival level. The second check box is used to carry over from archival parent. Check the second box if you want the data to carry over from the parent record -- e.g., if you want the data in a field of a File Unit record to carry over from the same field of the parent Series record.

- When you have finished, click the Save and Activate link to save the values and immediately activate this defaults account, *or*

  click the Save and Close link to save your changes and close the window without activating the defaults account.

When activated, "Using Defaults:" with the name of the defaults account will appear on the Status Bar at the bottom left.



When you add a new record, the defaults from this account will appear on the screen.

Note: The program remembers if you were using defaults when you leave the screen or exit the program. When you return to this module or log back in with the same user ID, the defaults will still be active. See B.6 below for information on how to deactivate defaults.

2. *Can I set defaults on all fields?*

Yes. However, the acronym and modifier for the catalog and accession number fields are already set as carry over which cannot be changed in the default entry.

The Controlled Property field already has a default entry of ‘N’ which cannot be changed in the defaults. When you add a new catalog record, you can change the ‘N’ to ‘Y’ if applicable.

3. *Can I overwrite defaults and carry over fields?*

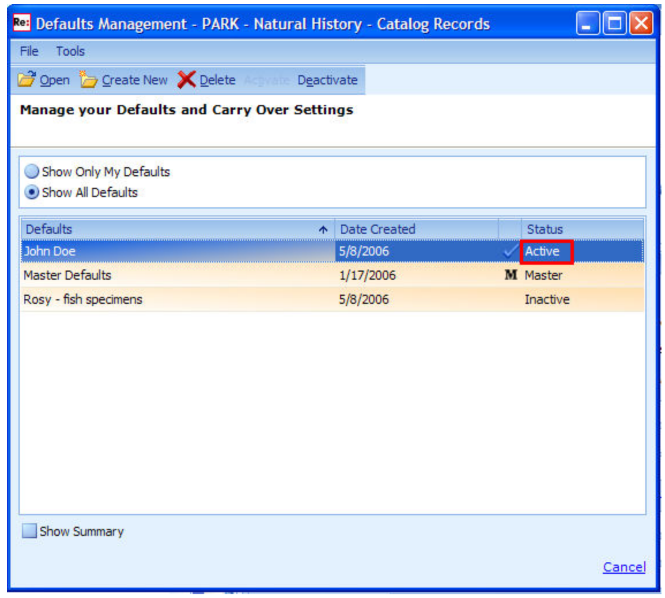
Yes. When you add data to a record with default and carry over settings, you can change a default value by deleting or overwriting it. When you add the next record, the default value returns unless you have set Carry Over for the field. With Carry Over, the changed value will appear instead.

4. *How do I activate an existing defaults account?*

To activate an existing defaults account:

- From the Edit menu, choose Defaults and Carry Over Fields.
- Then, select Activate Defaults or Defaults Management.
- Highlight the defaults account you wish to activate, then either click the **Activate** button on the toolbar or go to the File menu and select the Activate option. The Status of the defaults account will change to Active.

Note: Only one account can be active at the same time. If another account is active, to activate a new account, you must first deactivate the other account.



When activated, "Using Defaults:" with the name of this defaults account will appear on the Status Bar at the bottom left.

With the established defaults activated, adding a new record will make the values from this defaults account appear automatically.

Note: The program remembers if you were using defaults when you leave the module or exit the program. When you return to this module or log back in with the same user ID, the defaults will still be active. See B.6 below for information on deactivating defaults.

5. *How do I modify or view an existing defaults account?*

To modify or view the default entries for an existing defaults account:

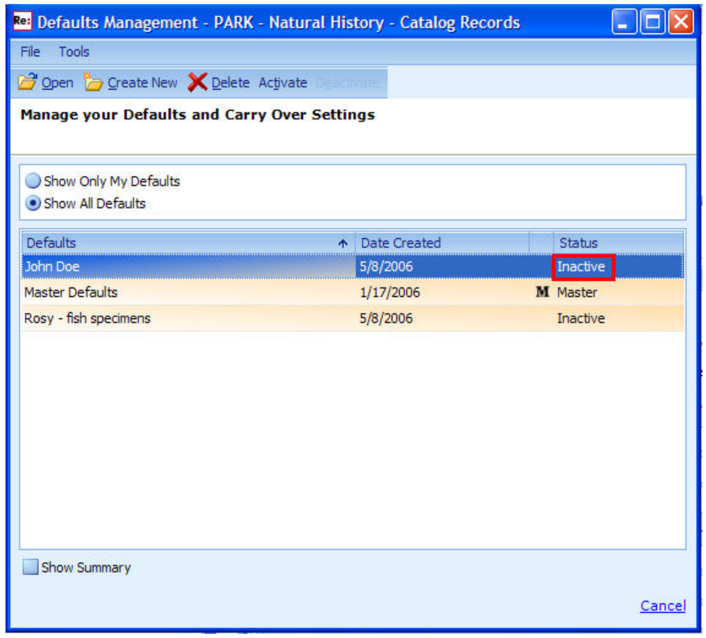
- From the Edit menu, choose Defaults and Carry Over Fields.
- Then, select Defaults Management.
- Highlight the defaults account you wish to view or modify and then either click **Open** on the toolbar or go to the File menu and select the Open option.
- You can view the properties and default data for the account and make changes if desired.
- If no changes are made, close the window or click Cancel. If changes are made, click Save and Activate to save the changes and immediately activate that defaults account or click Save and Close to save your changes and close the window without activating the defaults account.

Note: You can only modify defaults accounts created by you. But you can use defaults created by others if they chose Allow Others to Use when they created them. To make modifications to other users' defaults, open them and click **Save As** on the toolbar. Enter a new name and click OK, then close the Defaults account window. In the Defaults Management window, select the new name and click Open. You can then modify properties and default data.

6. *How do I deactivate a defaults account that is currently in use?*

To deactivate a defaults account:

- From the Edit menu, select Defaults and Carry Over Fields.
- Then, select either Deactivate Defaults or Defaults Management
- Highlight the defaults account you wish to deactivate, then either click Deactivate on the toolbar or go to the File menu and select the Deactivate option. The Status of the defaults account will change to Inactive.



- Close the Defaults Management window to return to the data entry screen. With the established defaults inactive, you can add new records without the default data appearing.

7. *How do I delete a defaults account?*

To delete a defaults account:

- From the Edit menu, select Defaults and Carry Over Fields.
- Then, select Defaults Management.
- Highlight the defaults account you wish to delete and then either click <u>Delete</u> on the toolbar or go to the File menu and select the Delete option.
- The system will ask if you are sure you want to delete the selected defaults account. Click Yes to permanently delete the defaults account.

Note: You cannot delete the Master defaults account.

VIII. MACROS

A. Overview

1. *What is a Macro?*

A Macro is a set of saved keystrokes or keyboard commands.

2. *When do I use Macros?*

Use the Macros function to create data entry shortcuts and save keyboard work. They can also help prevent misspellings. You only type the entry once and then reuse it.

Note: Macros are only available in simple text and memo fields.

Example: You may have a large number of objects with the same maker's information on them. Instead of typing the information into every record, set up a macro that allows you to enter the information with one keystroke.

A macro can also be used to some degree to automate tasks, recording keystrokes such as Tab as you move from field to field during data entry.

Note: Macros do not record mouse clicks.

In the program you can create and save macros to use at any time. Multiple macro tasks can be saved in a "macro set", which is saved as a file on your computer.

3. *Can I create more than one Macro?*

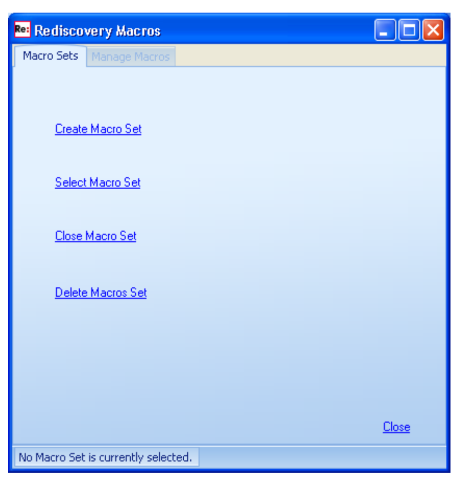
Yes. You can create more than one macro to use during data entry. These are called Macro Sets. You can even have different sets of Macros that can be used when cataloging different projects.

B. Creating Macros

1. *How do I create a Macro set?*

To create a Macro set:

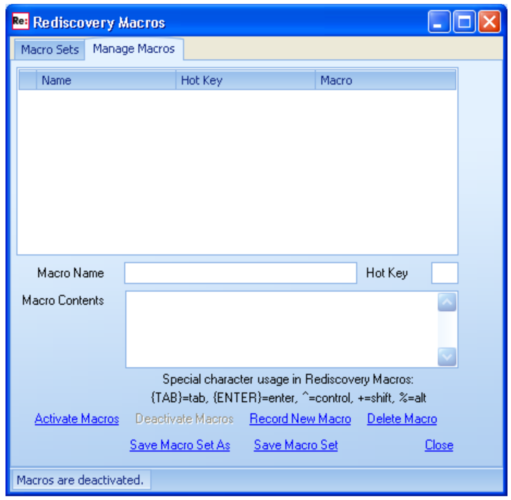
- Select Macros from the Edit menu, then Macros Management. The Rediscovery Macros window opens.



- From the Macro Sets tab, click Create Macro Set.

- Choose a folder on your computer where the macro set will be saved, and enter a file name for your macro set.

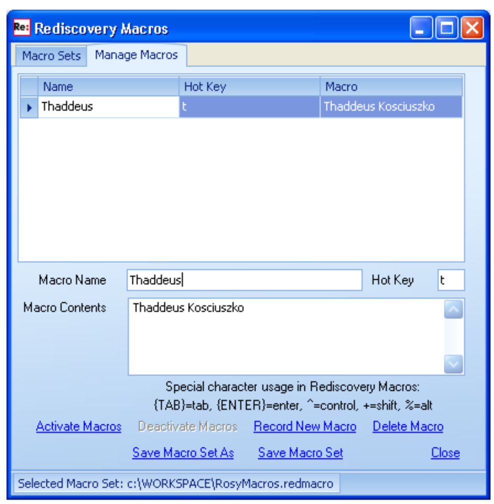
- Click the Open button to save the file. The macro set file will be saved to your computer, and the Manage Macros tab will open in the Rediscovery Macros window.



- Click Record New Macro to start recording your macro.

- There are 2 methods to create your macro task:

  1. To create a macro for a simple string of text, click Stop Recording. Then enter the string of text in the Macro Contents field. Enter a Macro Name, and an optional Hot Key (a single character). Click Save Macro Set to save your changes.



  2. To create a macro to automate a series of keystrokes, it is easiest to perform the task while on a record screen on the main Rediscovery window.
     a. Click on the main program window which should be visible behind the Rediscovery Macros window.

b. Perform the task you want to record while in add or modify mode on a record. The macro will record your keystrokes only. **Note:** Mouse clicks are not recorded.
c. Return to the Re:discovery Macro window by selecting it on your Taskbar at the bottom of your computer screen (or use Alt-Tab to toggle to the Macro screen).
d. Click Stop Recording to stop recording your keystrokes.
e. Enter a Macro Name and an optional Hot Key.
f. You can edit the text in the Macro Contents field to remove errant keystrokes.
g. Then click Save Macro Set to save your changes.

- Create as many macros for this set as desired.

2. *How do I add to an already existing Macro Set?*

To add or modify a macro in an existing Macro Set:

- In any mode, select Macros from the Edit menu, then Record New Macro, *or*
- Select Macros from the Edit menu then Macros Management and the Rediscovery Macros window will open. Then click Select Macro Set.
- Choose the macro set file you wish to modify (the file will have a .redmacro extension).
- Click the Open button to open the macro set. The Manage Macros tab will open in the Rediscovery Macros window.
- Modify an existing macro or add new macros to the set as instructed in B.1 above.
- When you have finished adding, deleting or modifying macros, click Save Macro Set to save your changes. If you want to create a new macro set instead of overwriting the existing one, click Save Macro Set As instead. You can then give the macro set a new name and click Open to save the new set. The original set will be unchanged.

3. *How do I delete a Macro within a Macro Set?*

To delete a Macro from a Macro Set:

- In any mode, select Macros from the Edit menu, then Macros Management. The Rediscovery Macros window opens.
- From the Macro Sets tab, click Select Macros Set.
- Choose the file name for your macro set and click Open. The Manage Macros tab will open in the Rediscovery Macros window.
- Highlight the individual macro you wish to delete and click Delete Macro.
- Click Save Macro Set or Save Macro Set As to save the changes.

4. *How do I delete a Macro Set?*

To delete an entire set of Macros:

- Select Macros from the Edit menu, then Macros Management.

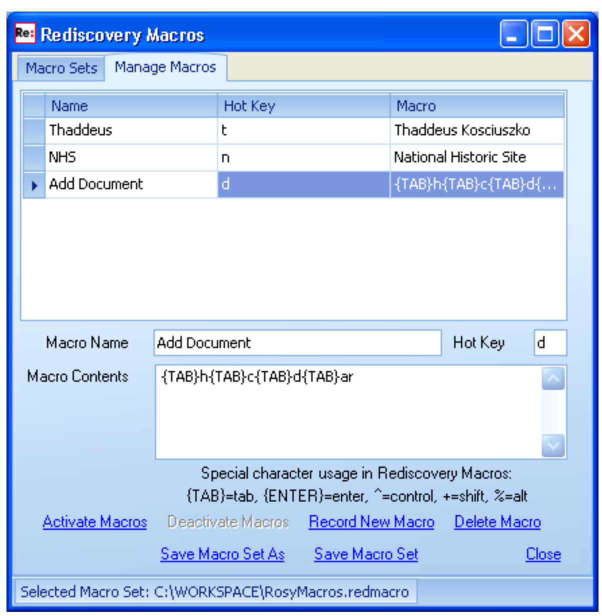
- From the Macro Sets tab, click Delete Macros Set
- Choose the macro set you wish to delete and click Open.
- You will get an "are you sure…" message. Click Yes, to delete the Macro Set.
- Click OK to the confirmation message.

C. Using Macros

1. *How do I use a macro during data entry?*

To use a macro:

- From the Edit menu, choose Macros, then Activate Macro.
- Click Select Macros Set in the Re:discovery Macros window.
- Locate and highlight the macro set file you wish to use (the file name will have a .redmacro file extension) and click Open. The Manage Macros tab will open.
- Click Activate Macros.
- Select one of the macro tasks in the grid.
- Toggle (Alt-Tab) to your data entry screen (you must be in Add, Copy or Modify Mode on the record), place your cursor where needed, and press F11 to "play" the macro. The text or series of keystrokes you recorded will be entered on the screen, just as though you typed them yourself.
- To use a different macro task from within the same macro set, toggle (Alt-Tab) back to the Rediscovery Macros window and select a different macro task from the grid. Now when you press F11 in your data entry screen, that macro will be played.



The example above illustrates a macro set with three tasks. Two of the tasks are simple text strings. The Add Docs task is a series of keystrokes to automate adding some data in a catalog record, using a series of authority table fields. After entering Add Mode, the user presses F11 to play the Add Docs macro. The macro tabs to the first field (Category) and types H to fill in "History" from the authority table. Then the macro tabs to the next field (Classification) and types C to fill in "Communication Artifacts". Then the macro tabs to the next field (Sub-class) and types D to fill in "Documentary Artifact".

2. *How do I stop using a Macro Set?*

To stop using the current macro set:

- From the Edit menu choose Macros, then Deactivate Macro, *or*
- From within the Re:discovery Macros window, click Deactivate Macros.

3. *How do I select a different Macro Set to use?*

To select a different saved Macro Set:

- In the Rediscovery Macros window or from Macros on the Edit menu, click Deactivate Macro if they are active.
- On the Rediscovery Macros window, go to the Macro Sets tab and click Close Macro Set.
- Click Select Macro Set to choose another macro file.
- Then, click Activate Macros to use this set in data entry.

Note: Simply clicking Select Macro Set will also close the current macro set and allow you to select another macro file.

IX. ASSOCIATED RECORDS

A. Overview

4. *What are Associated Records?*

Associated Records are groupings of records within a directory as well as across directories that share some commonality such as subject matter, collector, creator or usage.

For example, if you have catalog records in a Cultural Resources directory and a Natural History directory for items collected by the same person and archival documentation about that collection, you can create an association between them.

5. *What records can be associated with each other?*

You can create associations between the follow types of records in ICMS:

- Collections Module: Catalog Records
- Archives Module: Collection Level Records, Series Level Records, File Unit Level Records, and Item Level Records

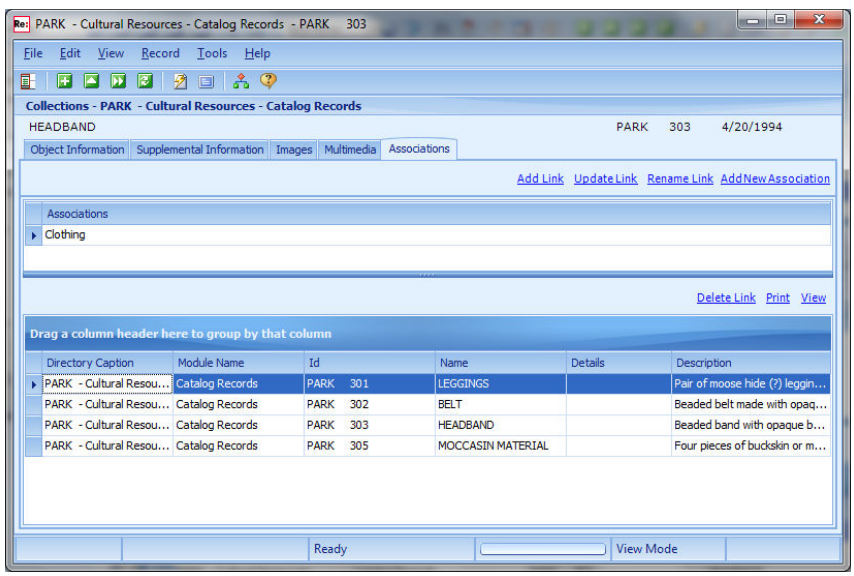
Note: Associations can be created across directories and modules.

6. *Can a record be linked to more than one Association?*

Yes. You can create associations or groupings of various types and attach the same record to multiple associations. For example, you may have a grouping of records by a specific artist or creator and another grouping by subject matter that contains some of the same records.

7. *How do I know if a record is linked to an Association?*

On the Catalog or Archival level record screens, select the Associations tab.



If a record is part of an association, the name of the association will be listed in the upper section. If a record is linked to more than one association, they will be listed here.

The lower section lists all records that linked to that association. If there is more than one association for an item, select the association from the list to view the records for that association in the lower section.

8. *Must I use the Associations tab?*

No. Use of the Associations tab is optional. It is useful if you need to create connections between records across multiple directories and modules.

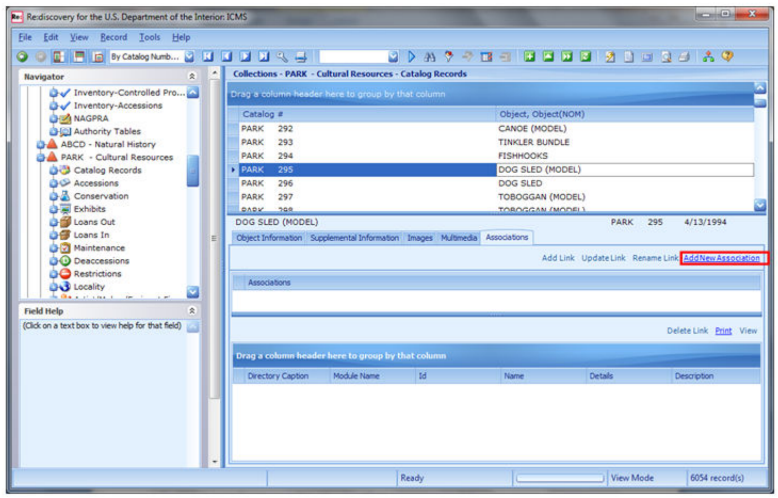
B. Creating Associations

3. *How do I create an association between two records?*

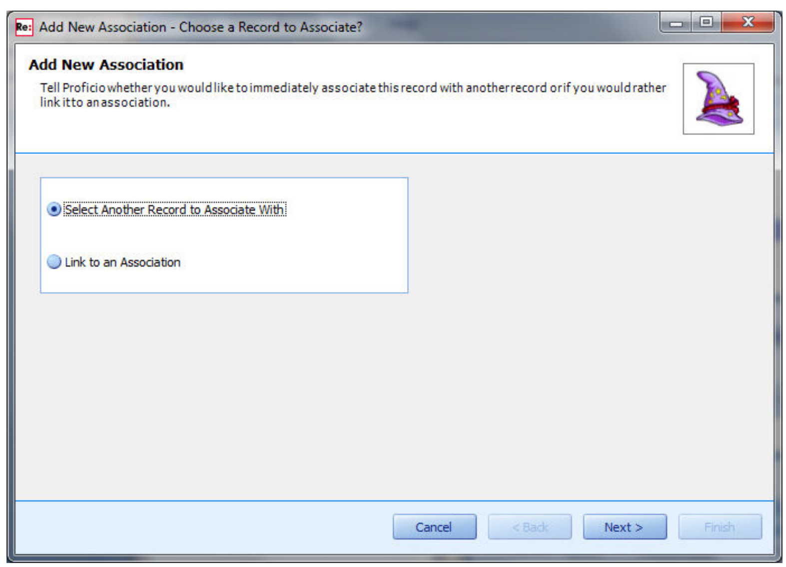
To create an association between two records:

- Select one of the records you want to associate.

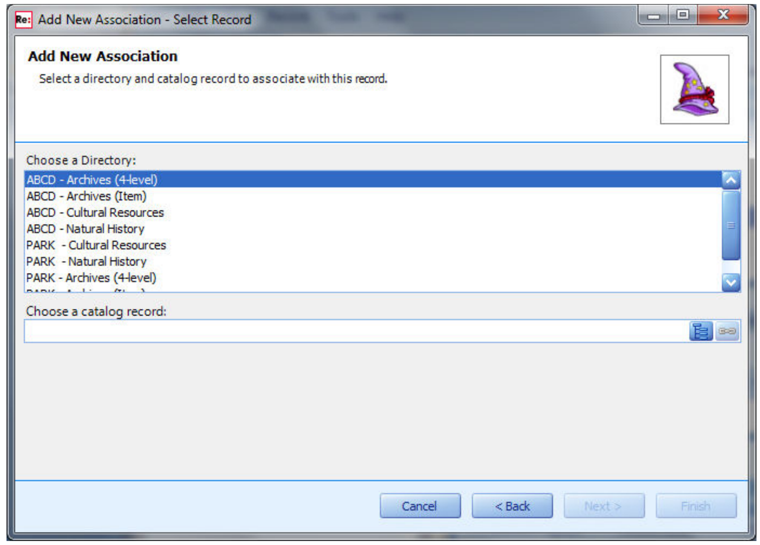
- In the Record Pane, select the Associations tab.



- Click the Add New Association link.



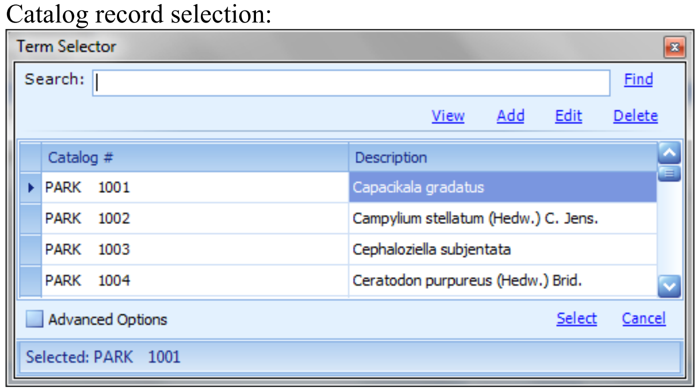
- Choose “Select Another Record to Associate With” and click Next.



- Select the directory where the second record is located. This can be the same directory you are in currently or a different directory.

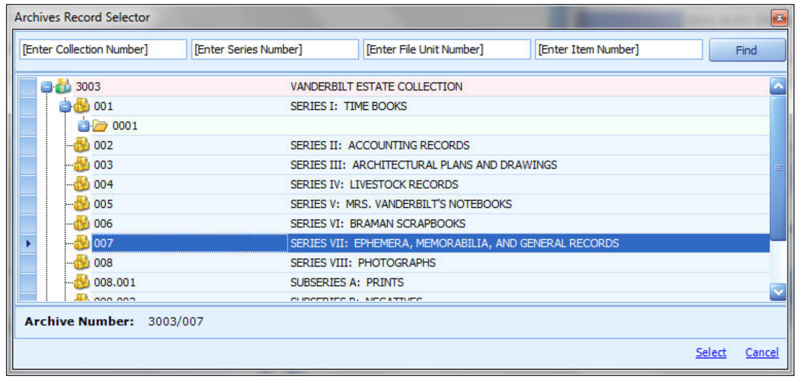
- Click the symbol at the end of the "Choose a catalog record" field to browse for the desired record. Depending on the type of directory you selected, you will see either the list of catalog records or the hierarchical list for archives.

Catalog record selection:

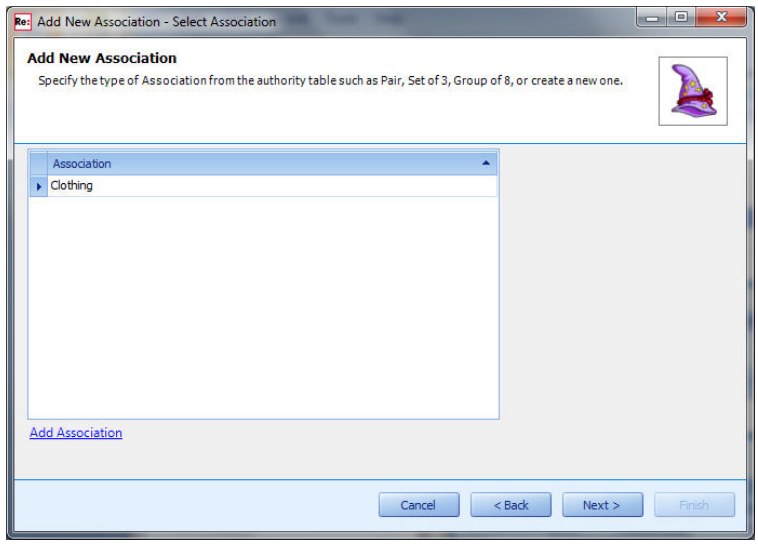


Note: For NPS style directories, you must enter the correct number of spaces between the acronym and the number to equal 12 characters to locate the specific record. As you type in the Search box, the list will change to show the records that match your entry.

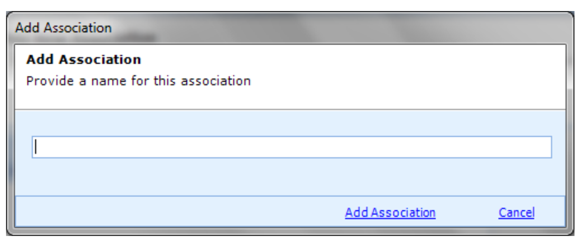
Archive record selection:



- Once you have highlighted the record, click Select.



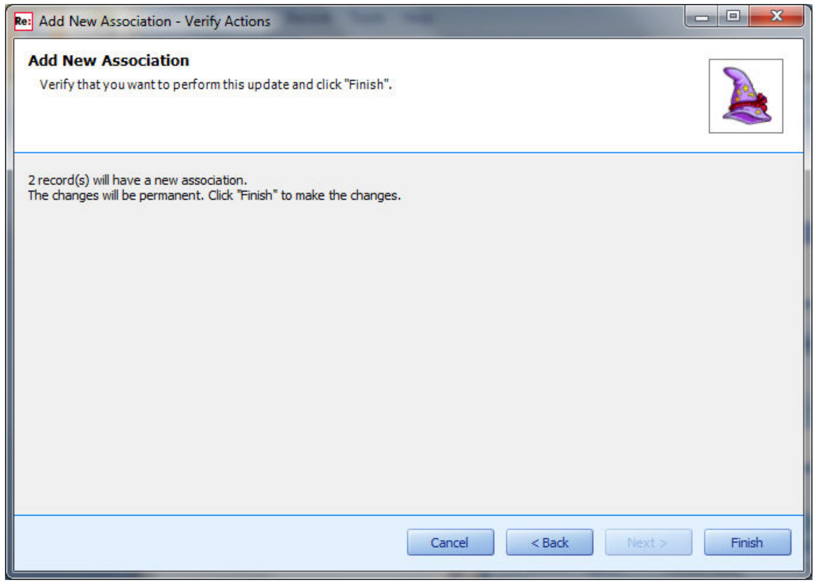
- You can either select an existing association from the list or add a new assocation by clicking "Add Association".



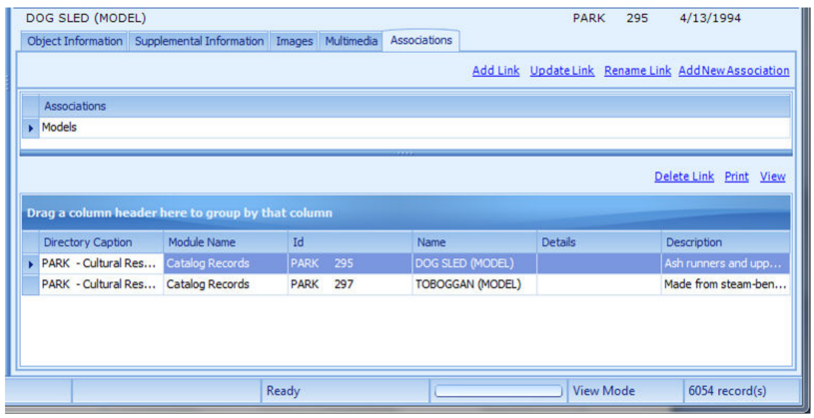
Enter the name for the new association and click "Add Association".

Once the new association is added, select it from the list and click Next.

- The next screen will tell you how many records will have a new association. Click Finish.



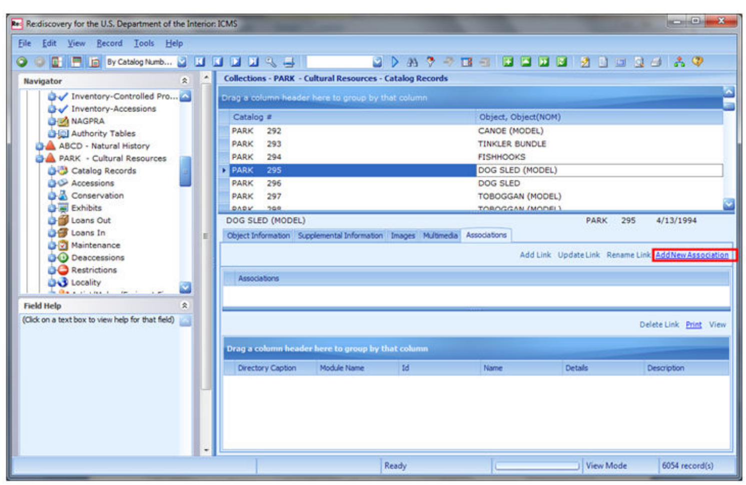
On the Association Tab for both records, you will now see the new Association listed and all of the records that are part of that Association.



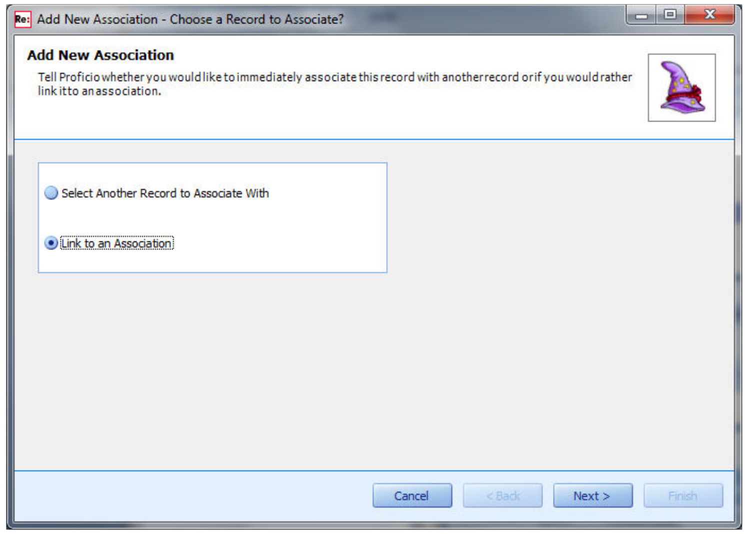
4. *How do I add a record to an existing Association?*

To link a record to an existing association:

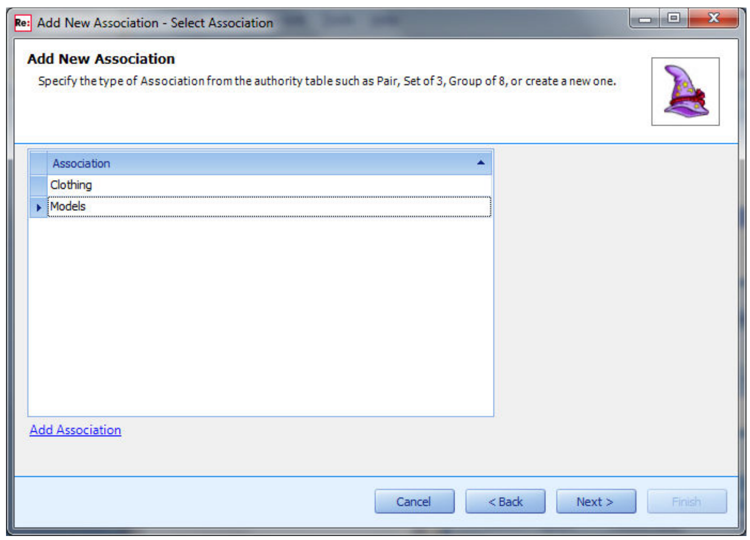
- In the Record Pane, select the Associations tab.



- Click the Add New Association link.

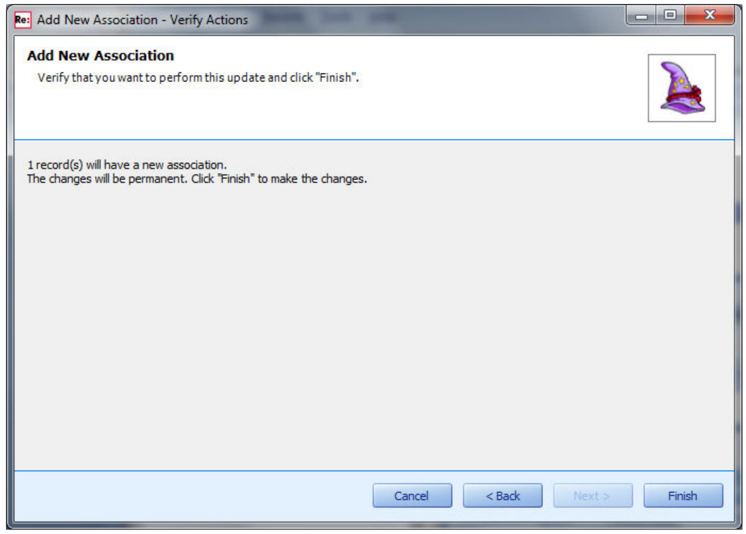


- Choose "Link to an Association" and click Next.

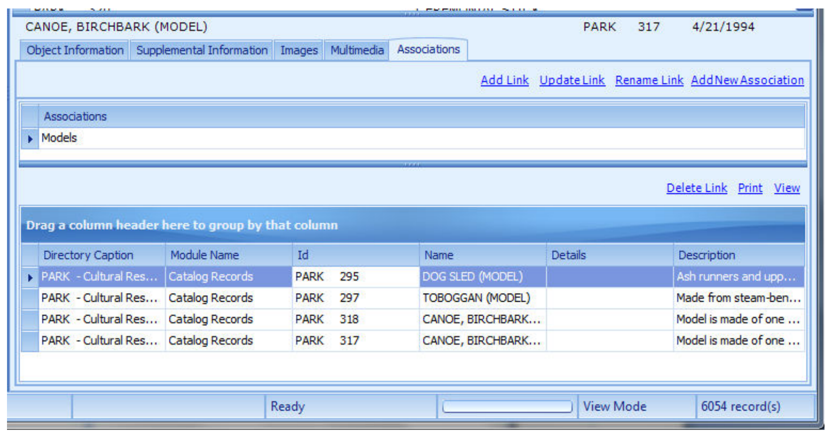


- Select an existing association from the list and click Next.

- The next screen will indicate that 1 record will have a new association. Click Finish.



On the Associations tab, you will now see the new Association listed and all of the records that are part of that Association.



5. *How do I add multiple Associations to the same record?*

To add another association to a record that already has an association:

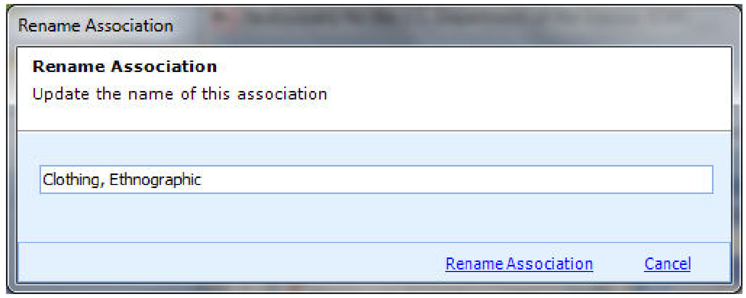
- In the Record Pane, select the Associations tab.
- Click "Add New Association" and follow through the same steps as when you added the first association. See number 2 above.

You will see both Associations listed on the Associations tab.

6. *Can I rename an Association?*

Yes. To rename an existing association:

- On the Associations tab of a record that is linked to the association you wish rename, select the association if there are more than one and click "Rename link".



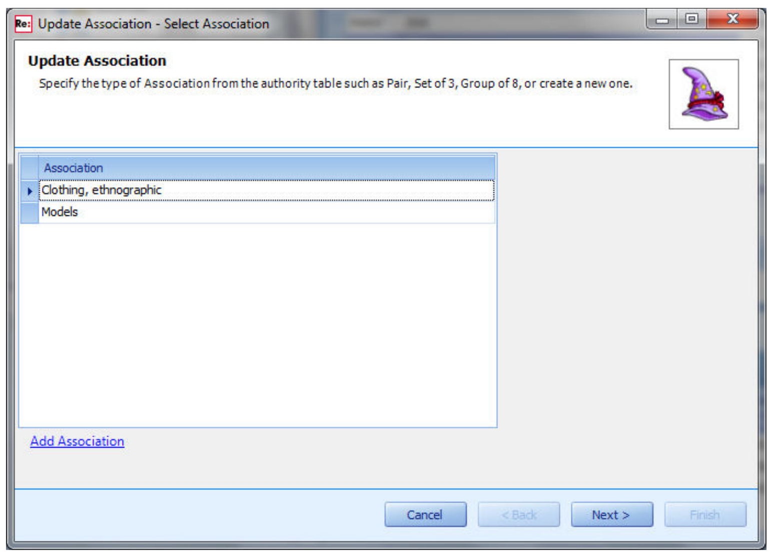
- Enter a new name for the association and click “Rename Association”.

- The new name will appear in the list of Associations for all records linked to that association.

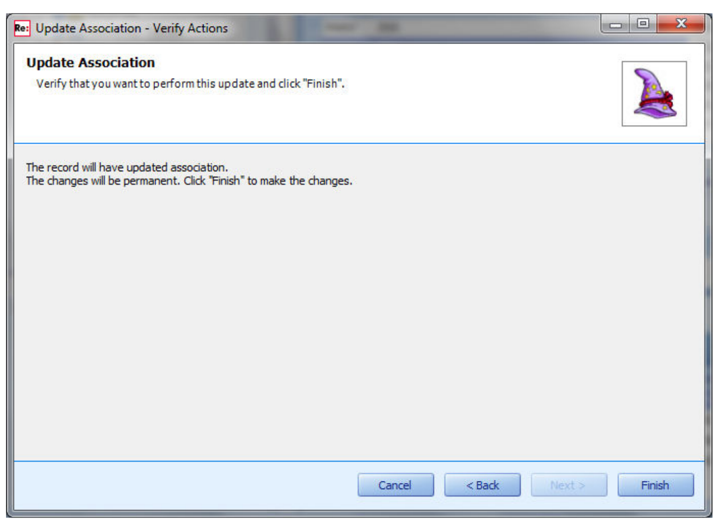
7. *How do I change the Association on a record?*

To change the association link on a record:

- On the Associations tab, click “Update Link”



- Select a different association from the list and click Next.



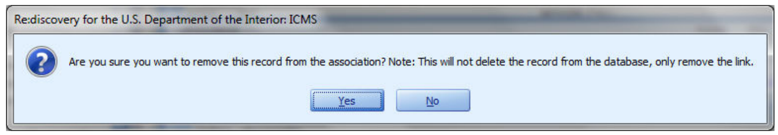
- The window will indicate that the record will have the association updated. Click Finish.

8. *How do I remove records from an Association?*

To remove individual records from an association:

- In the lower grid that lists all of the records that are in that Association, select the specific record from the list that you wish to remove from the Association .

- Click “Delete Link”. **Note:** This will remove the specific record from the Association; it will not delete the record from the database.



- Click Yes to remove this record from the selected association.

Note: You can only remove one record at a time with this method. See the Mass Association Records Update below to remove multiple records from an association at the same time.

9. *What other options are available on the Associations tab?*

There are several other options on the Associations tab to add and view records in the association and print a list of the records in the association.

Add Link

Use this to select another record to add to this Association. If there are multiple Associations listed for the record you are viewing, first click the Association Name that you wish to add the new record to, and then click “Add Link”.

Select the directory and then the record to add.

Print

Use this to print a list of all of the records in an Association. If there are multiple Associations listed for the record you are viewing, first click the Association Name whose records you want to print, and then click “Print”. The list will open in a preview window with various options for printing and saving the list as a file.

View

In the lower grid that lists all of the records that are in that Association, use this to view a specific record from the Association in a separate window. First, select the specific record from the list that you wish to view, and then click “View”.

Any of the changes made by a user with the options to add, update, rename, or delete links will be reflected on the Associations tab for all of the records in the affected Association. If you had previously viewed a record but do not see the change right away when you go back to it, click the Refresh button on the button bar.

C. Mass Association Records Update

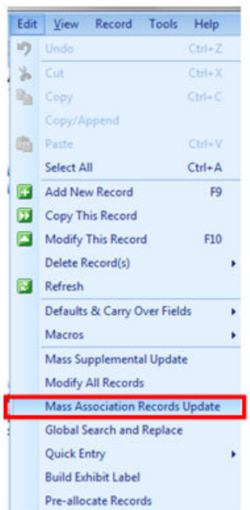
1. *How do I associate multiple records?*

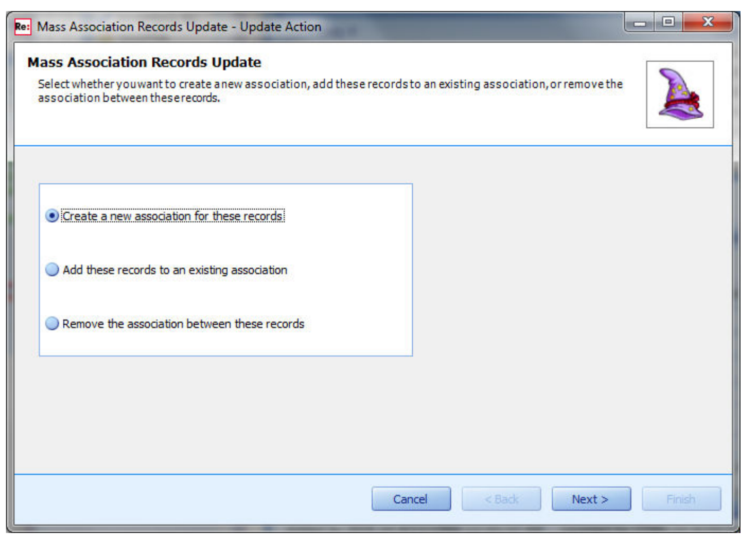
To save time, you may want to add multiple records from the same directory to an Association at once rather than repeating the process for each record. This process works for multiple records that exist in the same directory.

- Go to the directory that has the records that you want to add to the Association.

- Create a Tag or Filter of the records or highlight multiple records in the List Pane.

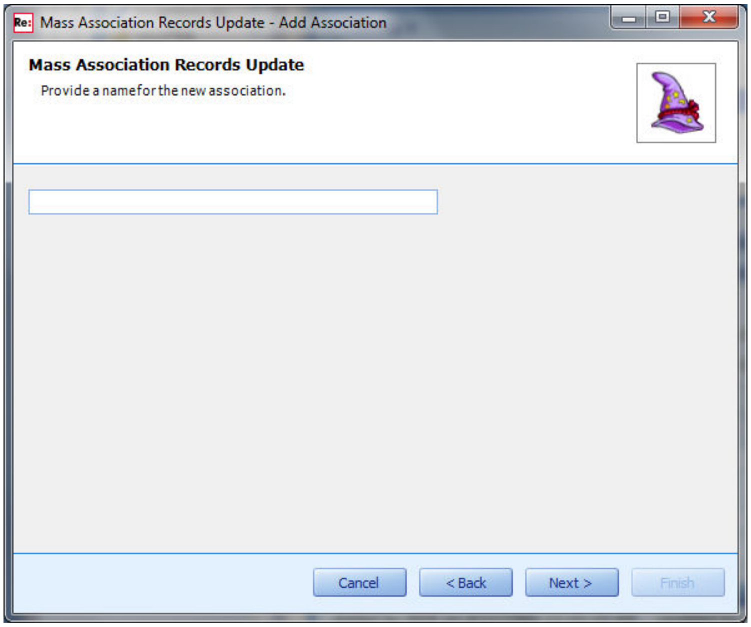
- On the Edit Menu, select Mass Association Records Update



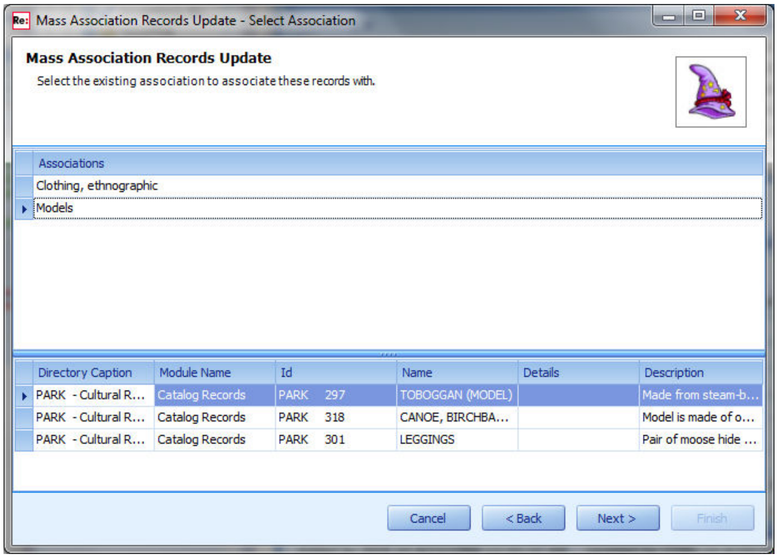


- Select whether to add these records to a new Association or an existing one.

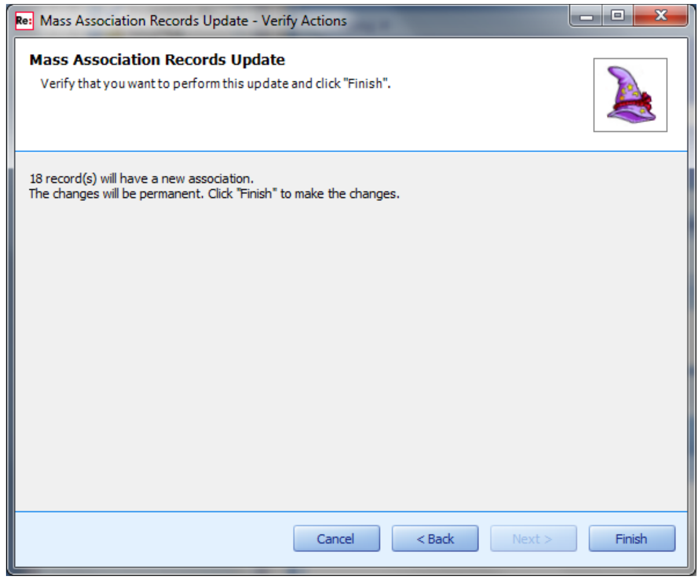
Create a new association for these records: the following screen will open for you to enter the name of the new association.



Add these records to an existing association: the following screen will open for you to select an existing association. As you click on an Association Name, the pane below will show you which records already exist in that Association. Select the desired Association Name.



- Click Next on either window after making your entry or selection.



- It will tell you that these records will have a new association or be added to an existing Association depending on the option you selected. Click Finish.

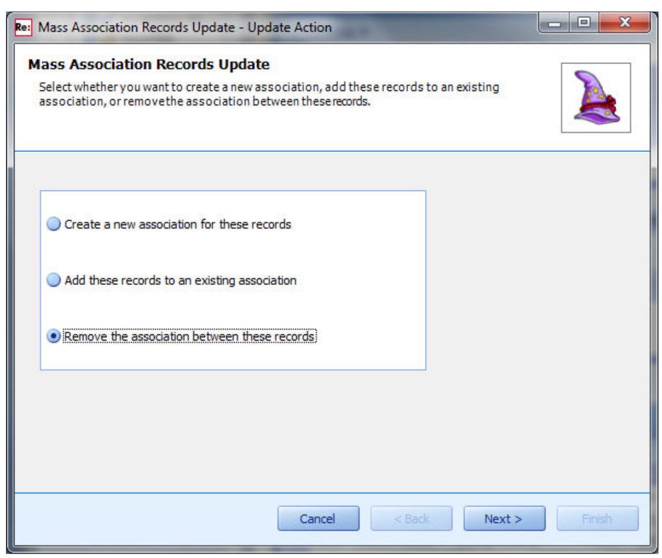
2. *How do I remove an Association from multiple records at the same time?*

You can use the Mass Association Records Update to remove and association from multiple records at the same time. This process works for multiple records that exist in the same directory.

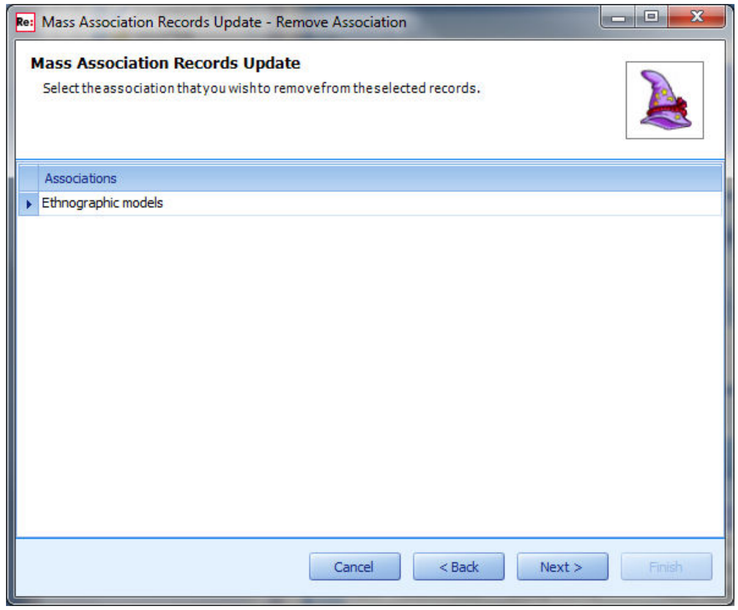
- Go to the directory that has the records that you want to remove the Association.

- Create a Tag or Filter of the records or highlight multiple records in the List Pane.

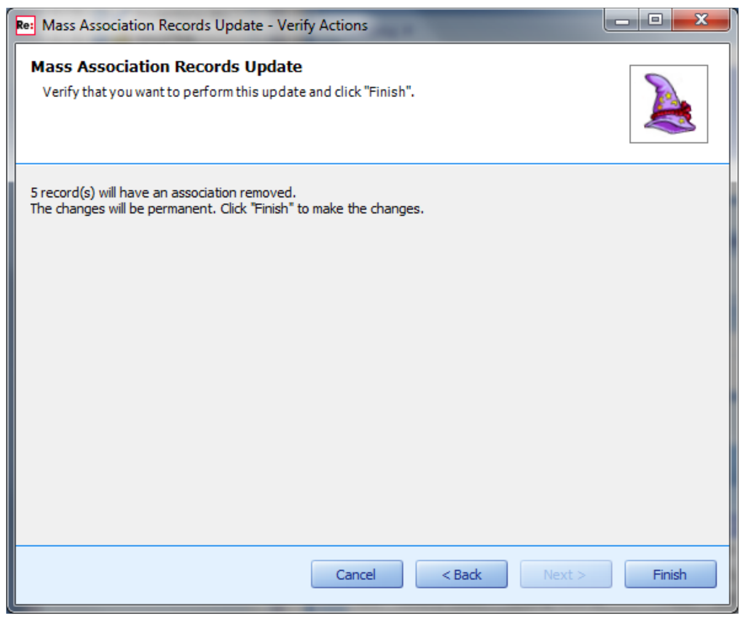
- On the Edit Menu, select Mass Association Records Update.



- Select "Remove the association between these records" and click Next.



- Select the association to remove. If there is more than one association in common for these records, select the one you wish to remove. Click Next.



- The screen will indicate that these records will have the association removed. Click Finish.